



SirsiDynix®

# SirsiDynix Training Guide

Director's Station End User

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# Table of Contents

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<b>Introduction.....</b>	<b>5</b>
<b>Training Overview .....</b>	<b>5</b>
Who Should Attend?.....	5
Prerequisite .....	5
Course Goals.....	5
Getting Connected .....	5
<b>Director's Station Overview.....</b>	<b>7</b>
<b>Dashboard and Popout Menu.....</b>	<b>7</b>
Popout Menu Bar.....	8
<b>My Director's Station Dashboard .....</b>	<b>10</b>
<b>Changing the Panel Layout .....</b>	<b>12</b>
<b>Changing the Panel Content.....</b>	<b>14</b>
<b>My Folder .....</b>	<b>17</b>
<b>Manage My Folder .....</b>	<b>17</b>
Adding Items .....	17
Editing Items.....	20
Deleting Items.....	21
Storing Items.....	21
Sorting Items.....	22
My Profile.....	22
<b>Reports .....</b>	<b>23</b>
<b>Delivered Reports .....</b>	<b>23</b>
Collection Analysis.....	23
Public Access Analysis .....	24
Dimensions and Measures .....	25
<b>Creating Reports .....</b>	<b>27</b>
<b>Title Lists in Reports.....</b>	<b>36</b>
List Copies by Total Circulation.....	36
<b>Filtering and Sorting Columns that Display .....</b>	<b>38</b>
<b>Filter Feature in Reports .....</b>	<b>42</b>
<b>Reports Toolbar.....</b>	<b>49</b>
Saving Reports.....	51
Printing Reports .....	54
E-mailing Reports .....	56
Design .....	57
Calculator.....	59
Report Settings.....	62
Grid Menu.....	67

<b><i>Charts</i></b> .....	<b>70</b>
<b>Creating Charts</b> .....	<b>70</b>
<b>Charts Menu</b> .....	<b>79</b>
<b><i>Meters</i></b> .....	<b>81</b>
<b>Creating meters</b> .....	<b>81</b>
<b><i>SwiftLinks</i></b> .....	<b>87</b>
<b>Saving Links</b> .....	<b>87</b>
<b>Sorting links</b> .....	<b>88</b>
<b>Removing Links</b> .....	<b>89</b>
<b><i>Index</i></b> .....	<b>91</b>

# Introduction

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## *Training Overview*

### Who Should Attend?

This course is intended for the users who want to access library information through the use of Director's Station reports.

### Prerequisite

No class is required.

### Course Goals

After completing this course, participants will be able to:

- Identify the components of the Dashboard
- Create a report
- Create a chart
- Create a meter
- Add a shared report to your personal Dashboard
- Remove a report or chart from your personal Dashboard
- Save and remove a public folder report

### Getting Connected

Access information to your particular Director's Station installation will not be provided as part of this training. Your Site Administrator should receive the following information from your SirsiDynix Project Manager:

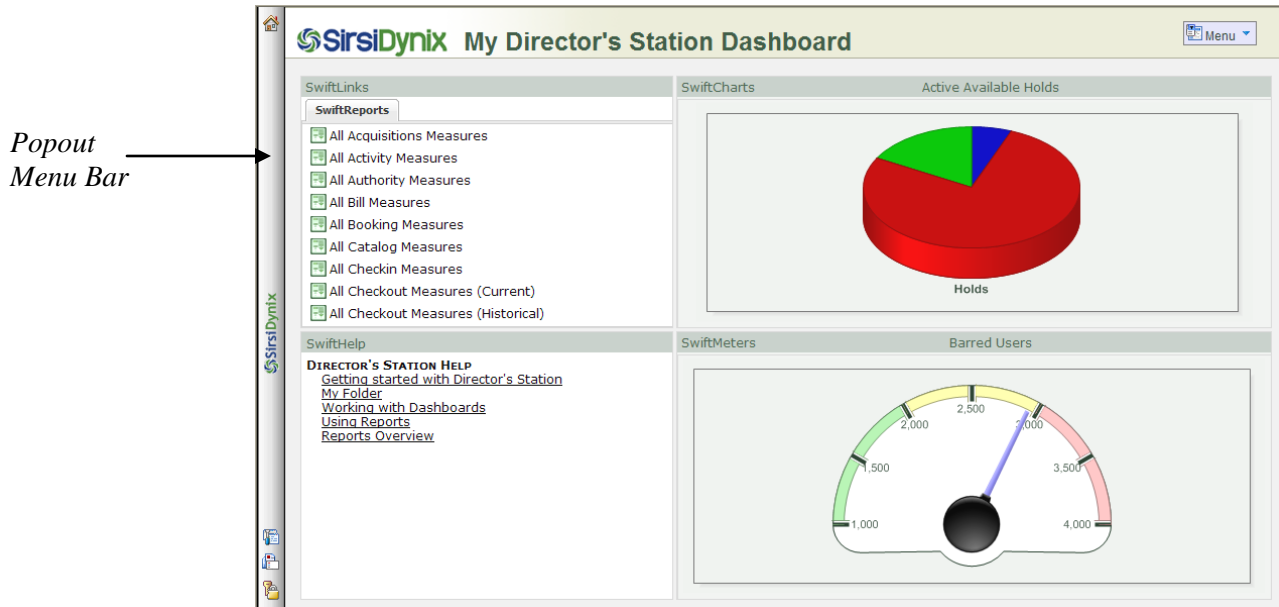
- URL for your instance of Director's Station
- Delivered Administrator login and password
- Delivered Director login and password

If you are the Site Administrator, change the administrator password as soon as you receive it. If you are not the Site Administrator, you may need to wait for users to be created and access rights to be assigned before accessing Director's Station.



# Director's Station Overview

## Dashboard and Popout Menu



The Dashboard is the starting point for collection analysis. Users can select components for their Dashboard from the following sections:

**SwiftLinks** – A panel that contains tabbed lists of delivered and customized reports in a SwiftReports tab, as well as SwiftMeters and SwiftCharts if any have been added to the Dashboard, and General functions that are used by administrators

**SwiftReports** – Delivered and customized reports

**SwiftCharts** – Graphs created from reports

**SwiftMeters** – Notifications for data that has crossed a set threshold or thresholds

**SwiftHelp** – A list of help topics delivered to assist in working with Director's Station.

## Popout Menu Bar

### Using the popout menu

1. To open the menu bar, from any point in the application, click on the gray space in the popout bar to display the popout menu.
2. To close the menu bar, from any point in the application, click on the gray space in the popout bar to hide the popout menu.

The Popout Menu includes the following folders or categories:

**About SirsiDynix** – This section contains a link to the SirsiDynix home page.

**Documentation** – This folder contains access points to the on-line help and links to SwiftKnowledge documentation.

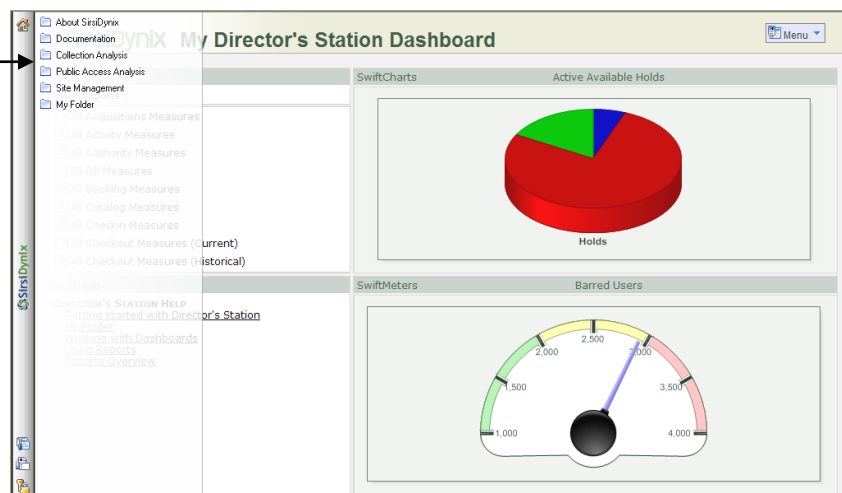
**Collection Analysis** – This folder is delivered to contain reports designed to access your SirsiDynix Symphony or Unicorn data. It is divided into functional areas in the library such as Administration, Technical Services, and Public Services. There is also a folder for All Measures All Modules. These are all of the delivered reports in Director's Station. Each of these reports has links to the appropriate drill-down lists and contains all of the available dimensions and measures.

**Public Access Analysis** – This folder is delivered empty. In previous releases it used to contain the report designed to access your OPAC data.






**Site Management** – This folder is used by administrators to administer Director's Station users, groups and access.

**My Folder** – Use this folder to organize customized reports, alerts, links, and documents.

Popout  
Menu



The Popout Menu bar contains the following icons:

Icon	Description
	<b>Home</b> – Click this icon at any time to return to your Dashboard.
	<b>Manage Menu</b> – Allows users in the Administrators Group to upload, organize, and manage public documents and reports. (This icon is hidden from users not in the administrator group.)
	<b>Manage My Folder</b> – Allows you to upload, organize, and manage your private documents and reports.
	<b>Log Off</b> – Click this icon to exit Director's Station. If you use the  to close the window, you will not immediately clear the session; it will remain active until it expires.

## My Director's Station Dashboard

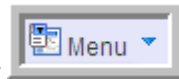
Whenever a user is logged in to Director's Station, he is associated with a personal Dashboard that is also called a SwiftView. When a user is first created, he will have a blank template SwiftView. The administrator will determine what SwiftViews are available to each user.

When you select a SwiftView, any report links you may have created on My Director's Station Dashboard will be overwritten with the selected SwiftView links.

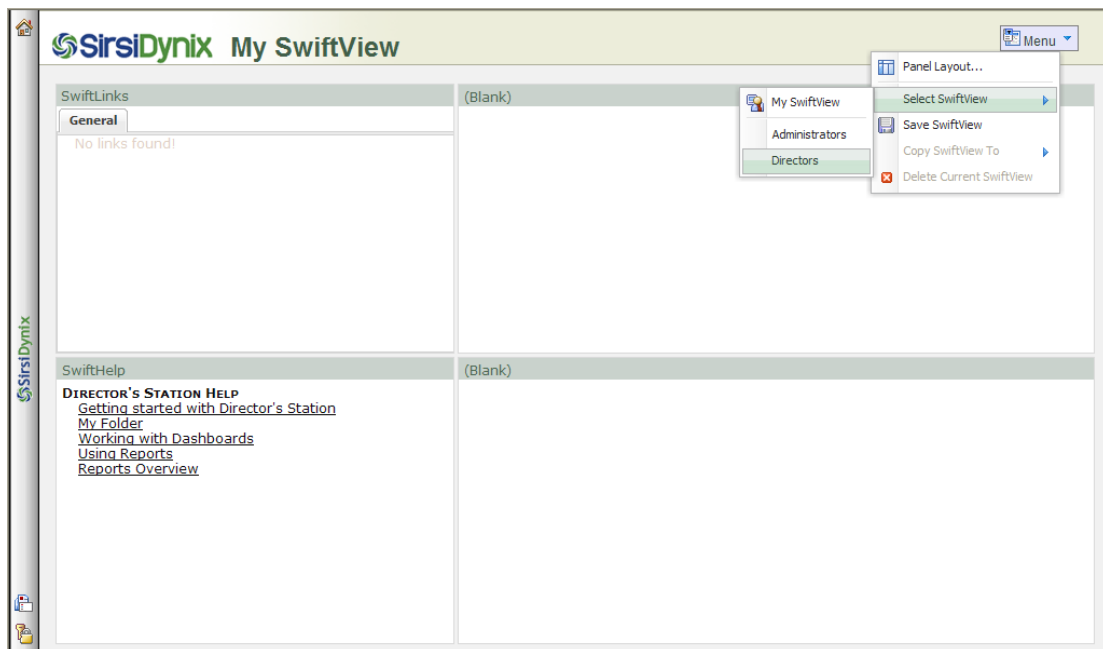
### To select a SwiftView

1. Log in as a new user.

2. Hover over



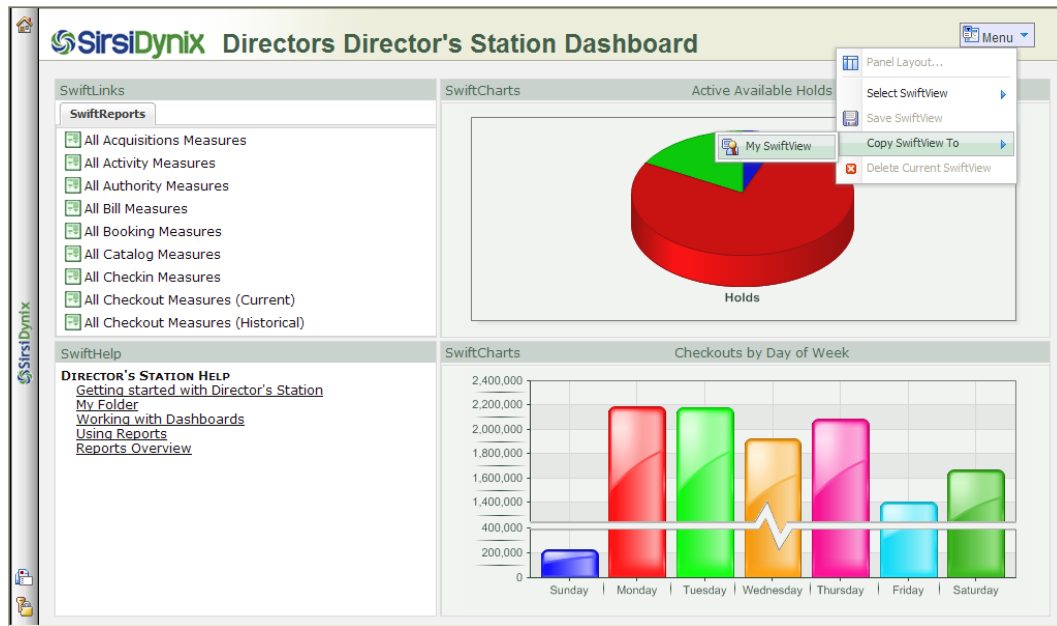
3. Scroll down to **Select SwiftView**:



4. Click the name of a SwiftView (e.g. Directors).

The SwiftViews listed are determined by the group assigned to the user by the administrator.

5. Click **Copy SwiftView To / My SwiftView**:



6. Click **Yes** to save the template My SwiftView.

A message displays indicating that you may continue working.

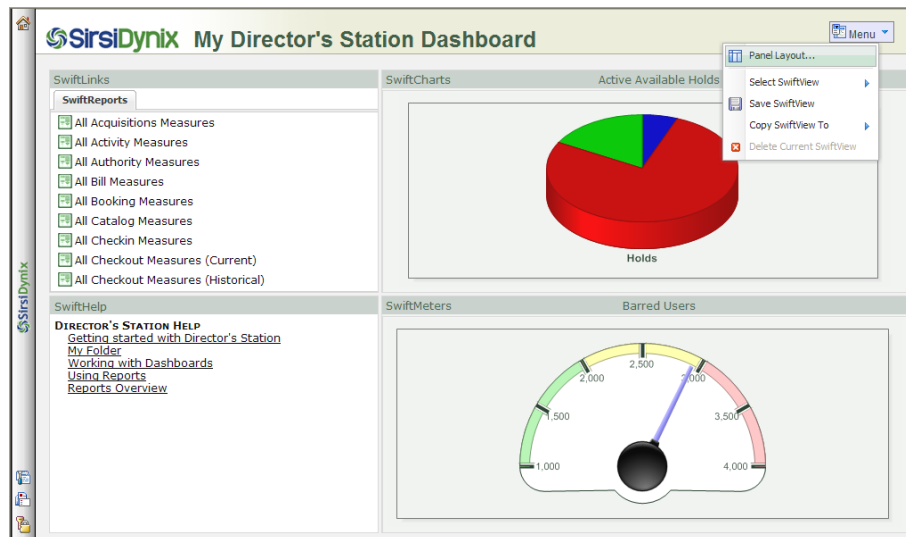
7. Log out and back in to confirm the SwiftView Dashboard change and to make changes to the new SwiftView.

The SwiftView is now associated with the new user. All changes made to the SwiftView from this point forward are saved to the user's personal Dashboard.

## Changing the Panel Layout

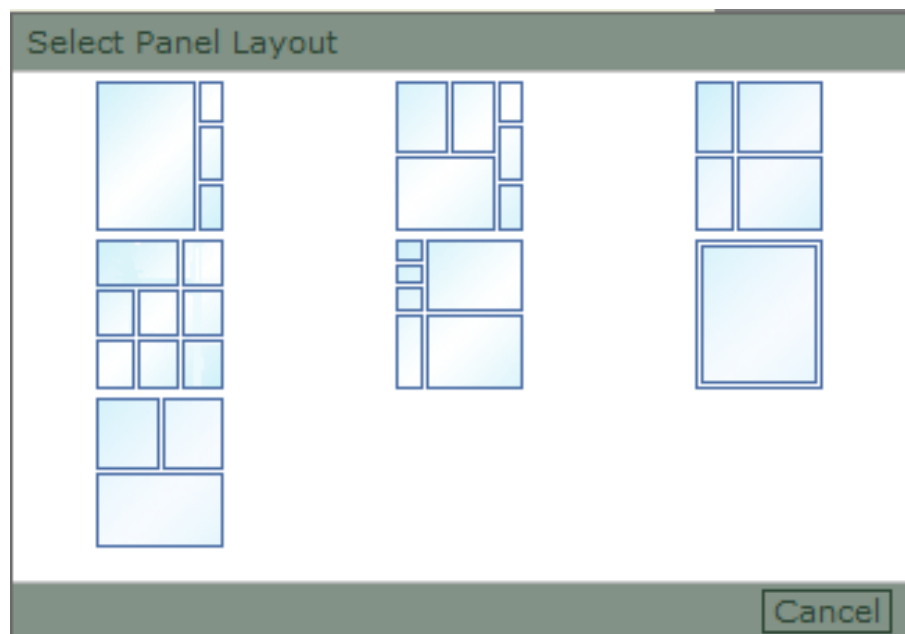
### To Select a Panel Layout

1. Hover over .
2. Click **Panel Layout**:

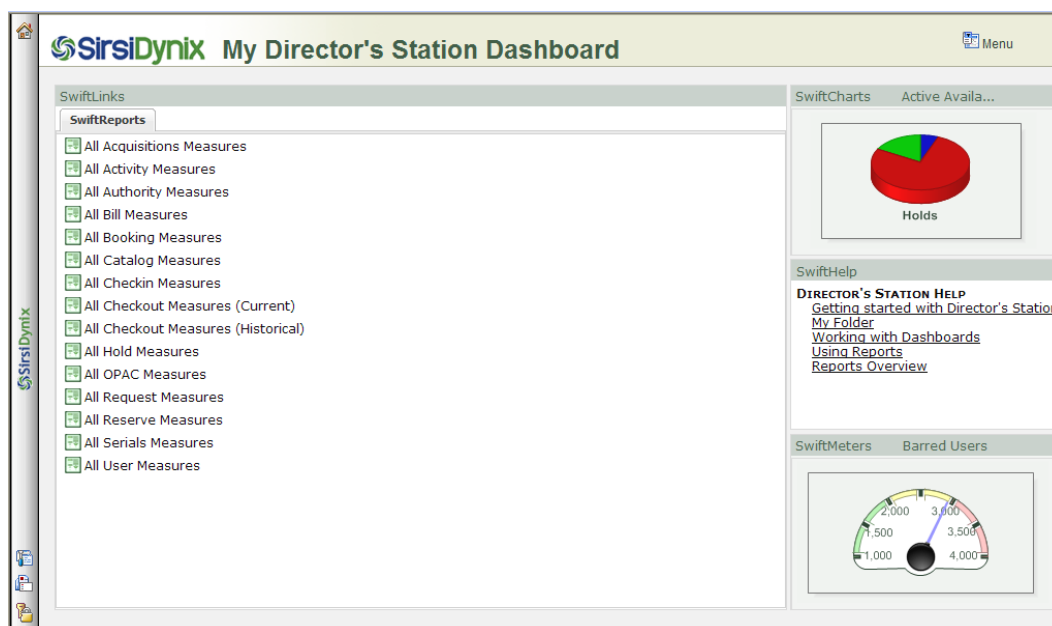


3. Select one of the seven panel options given.

The more panels you use, the longer it takes to launch.



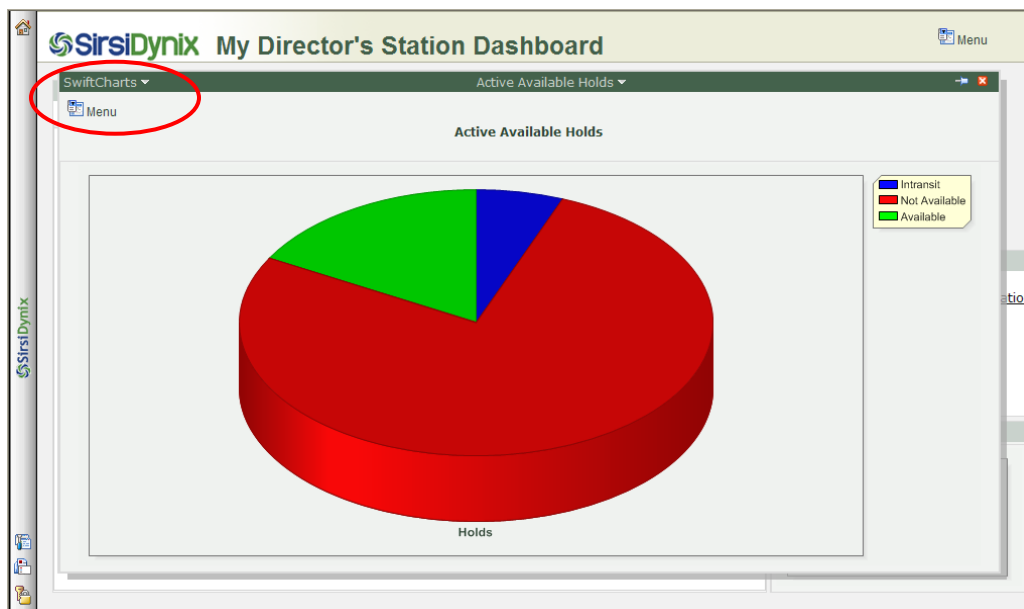
## 4. The appearance of the Dashboard changes:



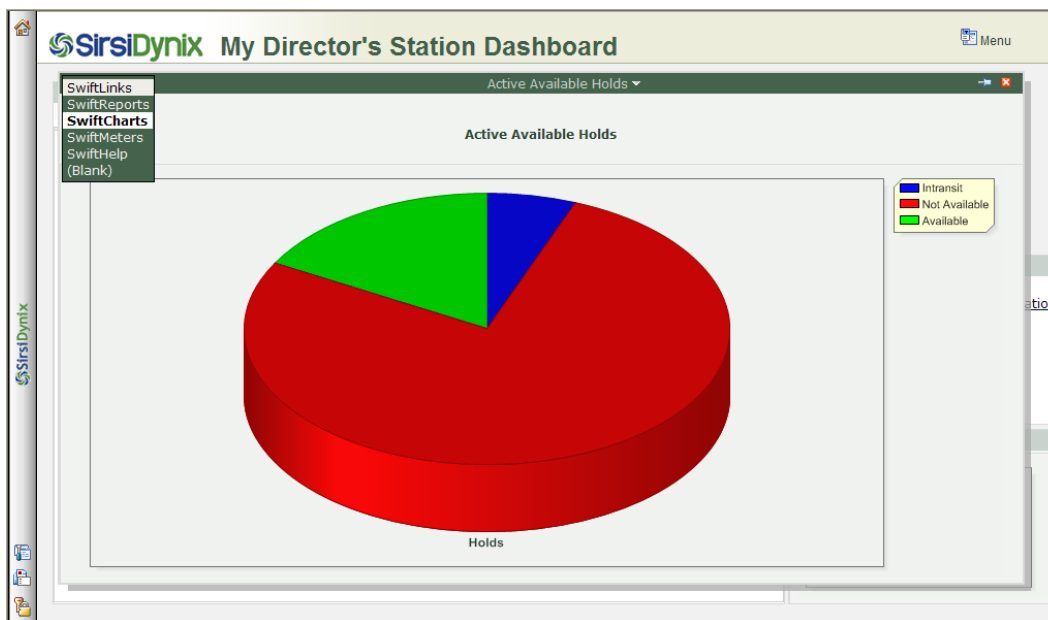
## Changing the Panel Content

### To Change the Panel Content

1. Click on the desired panel to expand it:



2. Click the down arrow in the top left corner of the panel.  
A list of panel types appears:



3. Click on a different panel name in the list.  
The new panel appears in the expanded view:

**SirsiDynix My Director's Station Dashboard**

SwiftReports All Acquisitions Measures


Menu Save Save As Print E-Mail Design Reload Info

**All Acquisitions Measures**

Fiscal Cycle: All Account Number: All Fundcyc Library: All Fund Level 1: All Fund Level 2: All  
Fund Level 3: All Fund Level 4: All Vendor: All Vendor Group 1: All Vendor Group 2: All  
Vendor Group 3: All Order Type: All Title Catalog Format: All Place of Publication: All Language of Title: All  
Call Type: All Browse Call Number: All Dewey Call Number: All LC Call Number: All Date Loaded: All  
Date Received: All Date Paid: All Date Ordered: All Holding Code: All HLDC Library: All

Measures

Fund	Amount Budgeted	Amount Encumbered	Amount Invoiced	Cash Balance	Free Balance	Amount Paid	Fundings Paid
All	983,588.45	106,849.49	33,124.48	235,213.58	95,239.61	748,374.87	622,404.31
CALV_ANF_DVD	1,155.00	1,115.63	.00	1,123.02	7.39	31.98	31.98
CALV_CALV_A_ATC							

4. Click  at the top-right corner of the panel or anywhere outside the expanded panel to collapse the panel back to the Dashboard:

**SirsiDynix My Director's Station Dashboard**

SwiftLinks

SwiftReports

- All Acquisitions Measures
- All Activity Measures
- All Authority Measures
- All Bill Measures
- All Booking Measures
- All Catalog Measures
- All Checkin Measures
- All Checkout Measures (Current)
- All Checkout Measures (Historical)
- All Hold Measures
- All OPAC Measures
- All Request Measures
- All Reserve Measures
- All Serials Measures
- All User Measures

SwiftReports All Acquisitions Measures

Fund

All

SwiftHelp

**DIRECTOR'S STATION HELP**

Getting started with Director's Station  
My Folder  
Working with Dashboards  
Using Reports  
Reports Overview

SwiftMeters Barred Users

Gauge Chart: 1,000 to 4,000



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# My Folder

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You upload, organize, and manage documents and reports from Manage My Folder in Director's Station. My Folder is a personal folder that no other person can access without your username and password. All of your information regarding personal reports, charts, meters, and emails are saved here, as well as other possible links.

By default Manage My Folder contains a My Folder folder and an Email subfolder.

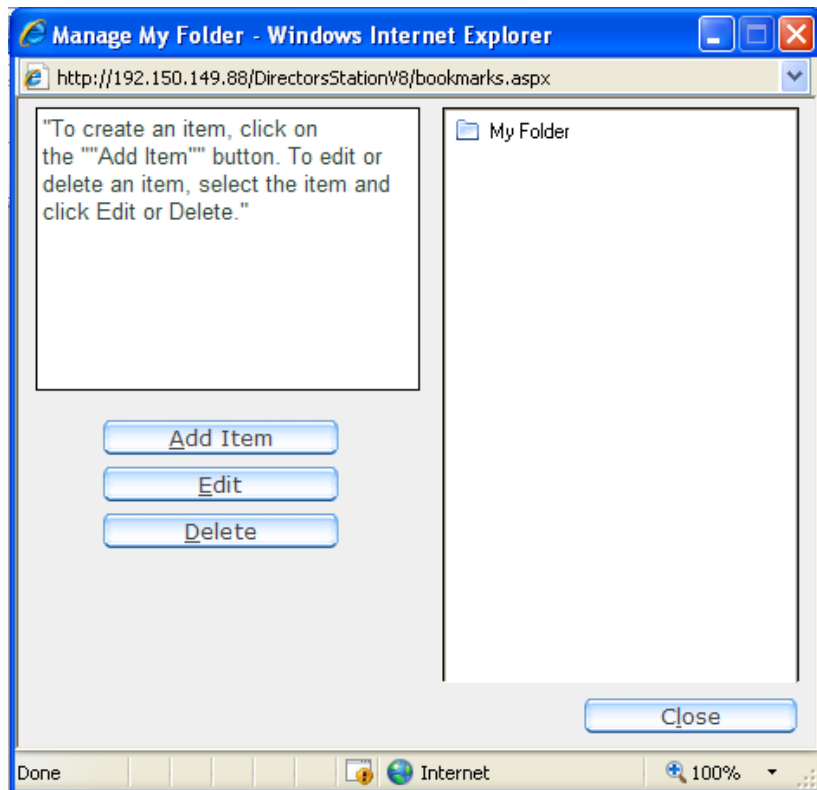
## *Manage My Folder*

### Adding Items

#### *To add a new item to My Folder*

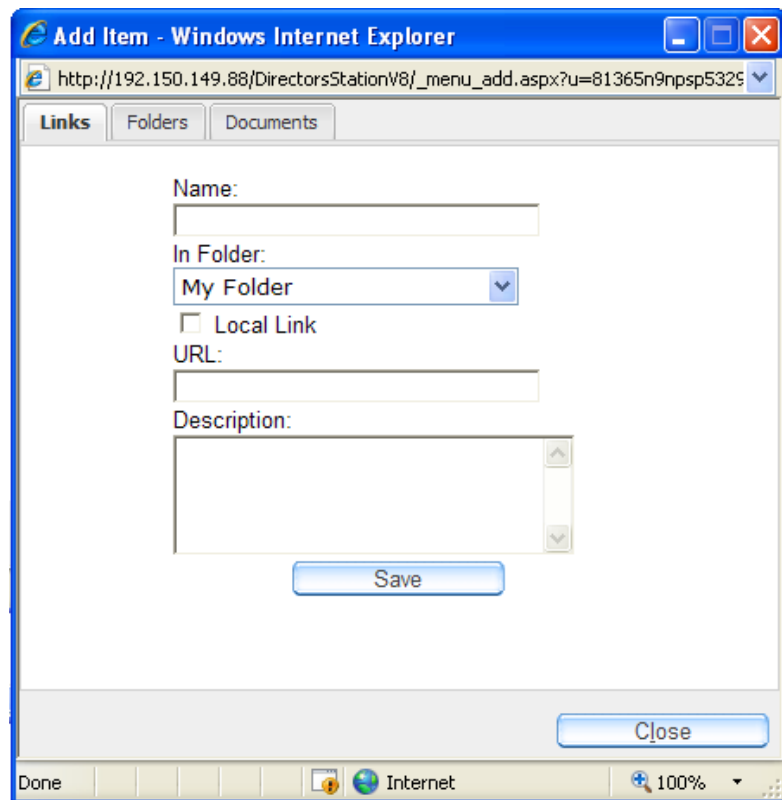
1. Click the **Manage My Folder** icon  in the popout bar at the lower-left corner of the window.

The **Manage My Folder** window appears:



2. Click **Add Item**.

The **Add Item** window appears:



3. Choose a tab to begin adding items:

**Links** – Add internal and external hypertext links

**Folders** – Add subfolders for organizing reports

**Documents** – Add any type of document

---

In addition, you can add items by saving a report, chart, or meter to My Folder.

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***To add a new folder to My Folder***

1. From Add Item, click the **Folders** tab.
2. Enter a **Name** for the folder.
3. Indicate whether the item will allow anonymous access.

---

Allow Anonymous means that the folder will be available before logging in to Director's Station. If the user clicks open the Popout menu in the initial Director's Station login screen, he will see those items saved as anonymous. Each level of the link, including the Category, must also be set to Allow Anonymous.

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- 
4. For **In Folder**, use the drop-down list to select the folder or subfolder where you want the folder to be stored.
  5. Click **Save**.

---

Top level category folders are managed in Manage Categories. There is no limit to the number or depth of subfolders that can be added within a category.

---

### ***To add a new link to My Folder***

1. From Add Item, click the **Links** tab.
2. Enter a **Name** for the link.
3. For **In Folder**, select the folder or subfolder where you want the link to be stored.
4. Check **Local Link** if the link is to a local document, not a web link.
5. Enter the **URL** for the link.

A local link includes the drive letter and path to an individual file on the Director's Station server. The path should include the Director's Station root directory:

*C:\Program Files\SwiftKnowledge Inc\SwiftknowledgeV8\SKWeb*

Folders of *.html* files can be retained for linking. A Web link requires an *http://* prefix.

6. Add a **Description** if desired.
7. Click **Save**.

### ***To add a new document to My Folder***

1. From Add Item, click the **Documents** tab.
2. Enter a **Title** for the Document.
3. For **In Folder**, select the folder or subfolder where you want the document to be stored.
4. Select the document **Type**, such as Excel, Word, PowerPoint, or Other from the drop-down list.

Any type of file can be selected. The type indicates what icon will be used on the menu. The icon is displayed next to the type when a type is selected. If you set the type for a Word document to an Excel spreadsheet, the type will be corrected to display the Word icon, and the document will open correctly.

5. Use the Browse button to select a file on your local machine.

---

When uploading documents it is easiest to start by selecting the File since other fields will auto-populate based on the file information. To fill this field, type the path and file name or browse to the file you wish to upload. The Title and Type will then auto-populate.

---

6. Add a **Description**, if desired.
7. Click **Save**.

---

All uploaded documents are transferred over the Internet and stored in the MSSQL DirectorsStationV8 application database. Administrators may want to limit the users who can upload documents since it may have an effect on bandwidth use and disk space. A loading box appears while the document is being loaded. The time to load documents is directly related to the size of the file and the speed at which the data is transferred. If you are uploading a large file during a high traffic time, it may take a significant time to load.

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If the original document is updated, this does not effect the uploaded version. If you need to update the uploaded version, you will need to upload the updated version.

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## Editing Items

When editing links it is important to know that all of the menu items are considered to be "links." Once created in the menu, they are all edited in the same way.

The link information is displayed and can be changed. As a general rule you should not edit the URL for any items. Editing these URLs will likely cause the link to stop working. Changing the type of link has no effect other than changing the icon displayed:

1. Click the **Manage My Folder** icon.
2. Click **My Folder** to display the items that may be edited.
3. Select one of the items.

The properties display in the white space.

4. Click **Edit**, and make the desired changes.
5. Click **Save**.

## Deleting Items

1. Click the **Manage My Folder** icon.
2. Click **My Folder** to display the items that may be deleted.
3. Select the item to be deleted.

The properties display in the white space.

4. Click **Delete**.
5. Click **OK** to confirm.

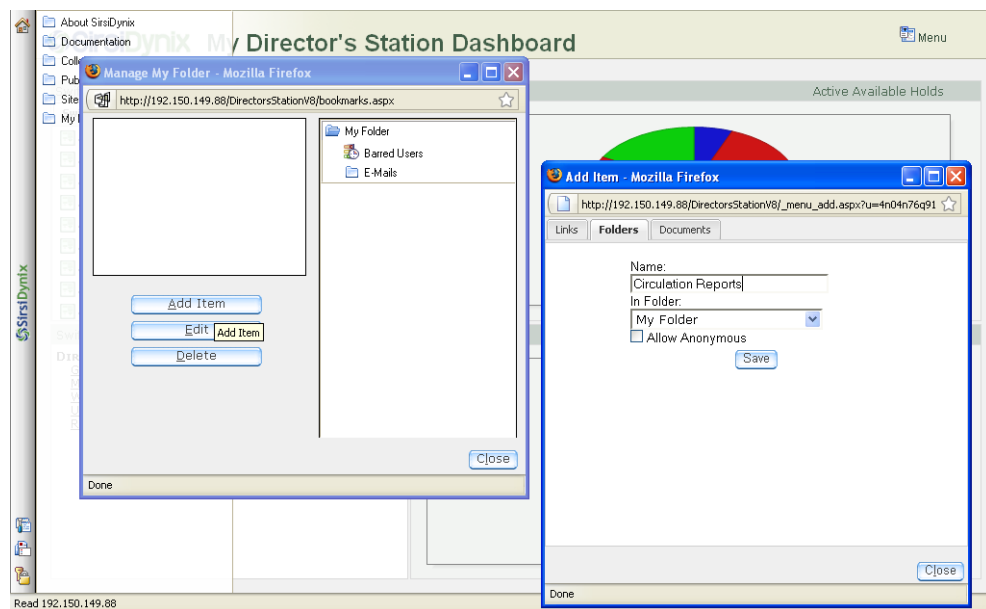
---

Deleting a subfolder automatically deletes all the links within that subfolder.

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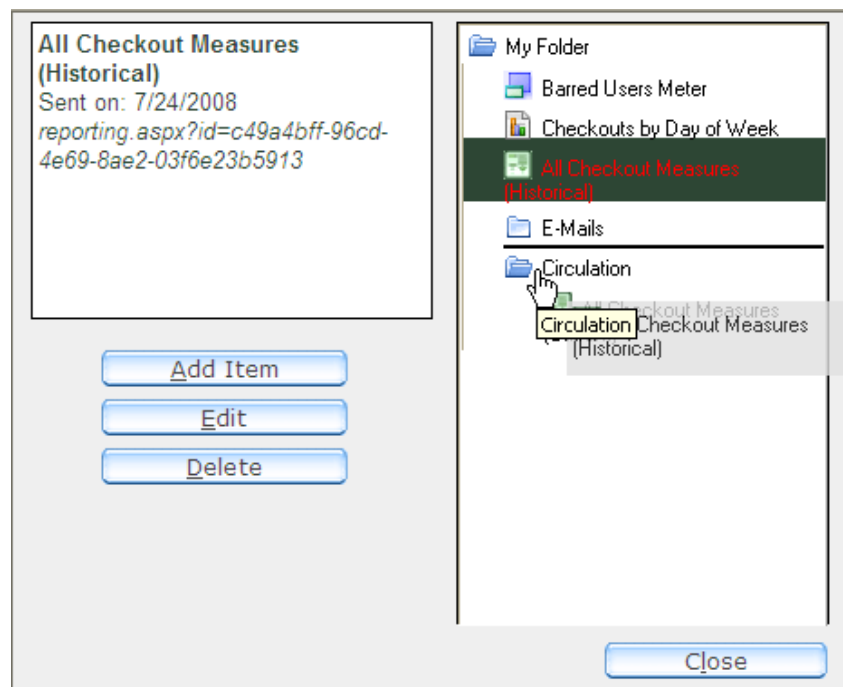
## Storing Items

My Folder data can grow quickly and become cluttered and disorganized. You should use the Add Item / Folders option to create a logical structure for organizing your saved links, reports, charts, meters, and documents:



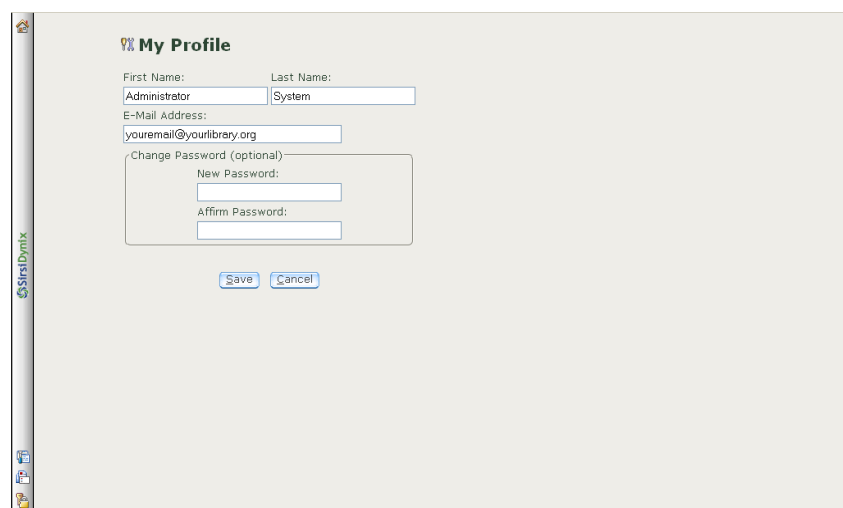
## Sorting Items

You can relocate the links in My Folder or subfolders by dragging the links to where you want them in the Manage My Folder window. As you drag a selected report across the My Folder structure hierarchy, the report is highlighted and a green bar displays where the report will be dropped. If you are dropping into a subfolder, the folder will open when the item being dropped is properly positioned:



## My Profile

You can use My Profile to change your name, e-mail address, or password:



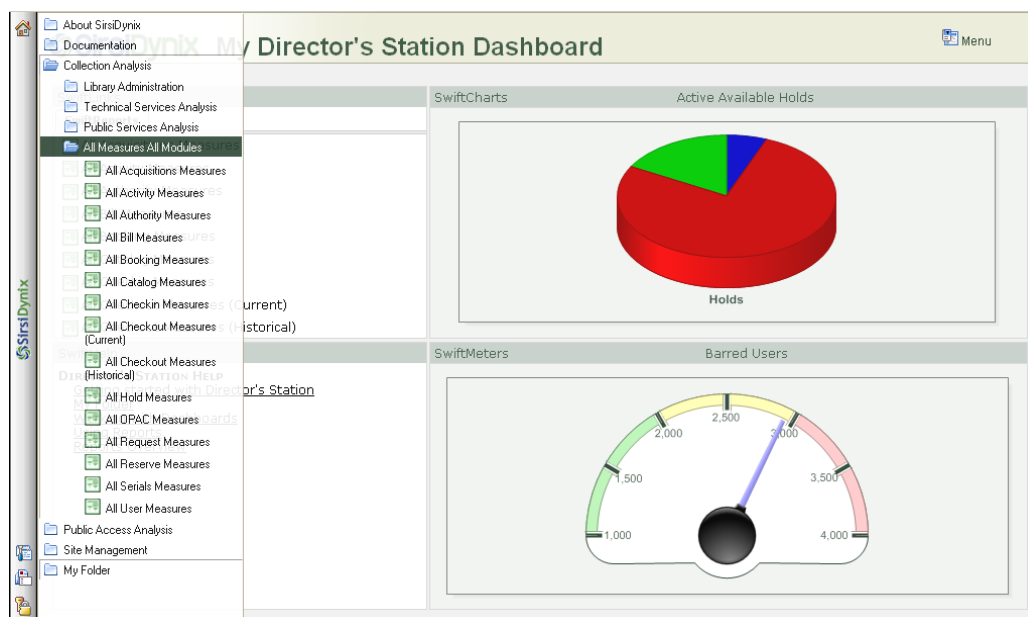
# Reports

Director's Station is delivered with an All ... Measures report template (e.g. All Cataloging Measures) for each Symphony module. Use these All ... Measures templates to create your own custom report views.

## Delivered Reports

### Collection Analysis

The **Collection Analysis** category includes the All Measures All Modules folder which contains all of the reports designed to access your library's data. Additional folders are available for you to categorize your public reports:



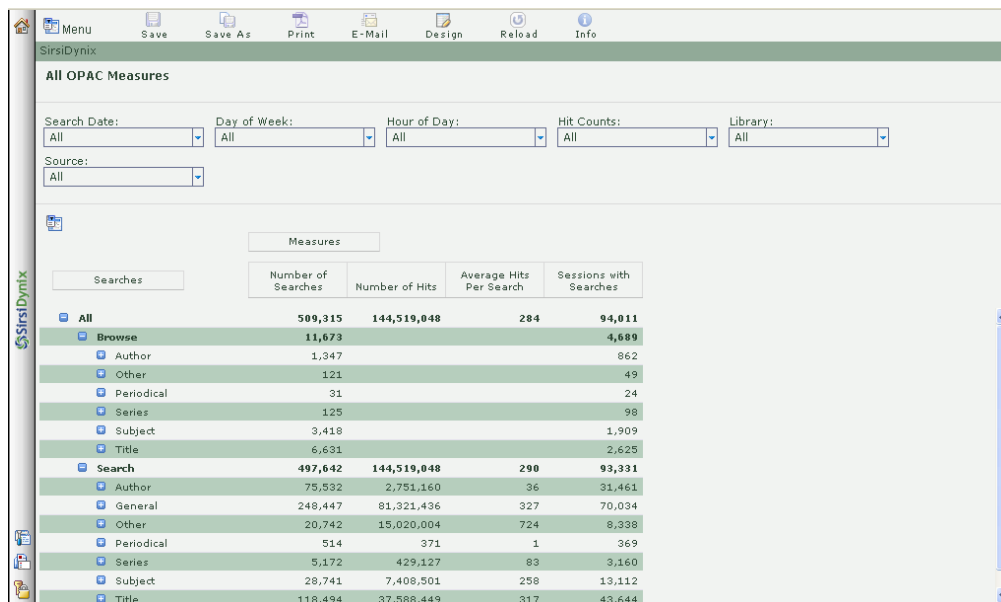
The following modules are mapped for analysis in Director's Station:

Academic Reserves  
 Acquisitions  
 Authority Control  
 Cataloging  
 Circulation  
 Materials Booking  
 Requests  
 Serials Control

The reports found in the All Measures All Modules area of the Popout Menu can also be found in the SwiftReports tab in the SwiftLinks panel on the Dashboard and on the SwiftReports panel pull-down list.

## Public Access Analysis

**Public Access Analysis** is available for you to save reports derived from the All OPAC Measures report, which contains information about e-Library searches:



Measures				
Searches	Number of Searches	Number of Hits	Average Hits Per Search	Sessions with Searches
<b>All</b>	<b>509,315</b>	<b>144,519,048</b>	<b>284</b>	<b>94,011</b>
Browse	11,673			4,689
Author	1,347			862
Other	121			49
Periodical	31			24
Series	125			98
Subject	3,418			1,909
Title	6,631			2,625
Search	497,642	144,519,048	290	93,331
Author	75,532	2,751,160	36	31,461
General	248,447	81,321,436	327	70,034
Other	20,742	15,020,004	724	8,338
Periodical	514	371	1	369
Series	5,172	429,127	83	3,160
Subject	28,741	7,408,501	258	13,112
Title	118,494	37,588,449	317	43,644


## Dimensions and Measures

Each report is comprised of Dimensions and Measures that allow the user to customize the content of the report.

**Dimensions** are values through which you can see your data. They are typically Symphony policies or dates used in your records. Dimensions appear in rows or columns in reports, or at the top in a dimension pool:

*Dimensions* →

	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Reserve Renewals	Staff Renewals	Patron Renewals	Use Item
All	255,109		103,771	8,167	65	12,379	124,119	
ALCOHOL	323	0.13%	127	13		27	196	
ALCOHOL/NU	91	0.04%	39			8	44	
ALEXANDER	137,463	53.88%	55,123	1,662	5	5,875	73,021	
ANNEX	1,193	0.47%	431			60	702	
ART	3,133	1.23%	1,458	1,146	3	500	26	
CAMDEN	25,186	9.87%	9,920	1,676	32	1,743	10,238	
CHANG	2,488	0.98%	1,062	242	4	97	1,083	
CHEMISTRY	1,310	0.51%	483	26		41	760	
DANA	22,351	8.76%	9,255	457	2	1,456	9,050	
DOUGLASS	16,608	6.51%	6,500	620	1	733	8,748	
HUNGARIAN	31	0.01%	24				7	
KILMER	9,154	3.59%	3,250	786	6	371	4,740	
LSM								

To collapse or expand the display of the dimensions in the dimension pool, hover over the line separating the dimension pool from the report area and click and drag the  symbol.

**Measures** is a special dimension that contains numeric values that give you a count, total, average, or percentage. Measures never appear in rows, only in columns or in the dimension pool:

Measures

Item Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Reserve Renewals	Staff Renewals	Patron Renewals	Use Item
All	255,109		103,771	8,167	65	12,379	124,119	
ALCOHOL	323	0.13%	127	13		27	156	
ALCOHOL/NJ	91	0.04%	39			8	44	
ALEXANDER	127,463	53.88%	55,123	1,662	5	5,875	73,021	
ANNEX	1,193	0.47%	431			60	702	
ART	3,133	1.23%	1,458	1,146	3	500	26	
CAMDEN	25,186	9.87%	9,920	1,676	32	1,743	10,238	
CHANG	2,488	0.98%	1,062	242	4	97	1,083	
CHEMISTRY	1,310	0.51%	483	26		41	760	
DANA	22,351	8.76%	9,255	457	2	1,456	9,050	
DOUGLASS	16,608	6.51%	6,500	620	1	733	8,748	
HUNGARIAN	31	0.01%	24				7	
KILMER	9,154	3.59%	3,250	786	6	371	4,740	
LSM								

# Creating Reports

The delivered reports can be used as-is, or they can be used as a starting point to create your own customized reports.

## To create a report

1. From the Dashboard, click one of the **All ... Measures** report templates in the **SwiftReports** tab in the SwiftLinks pane. A report like this appears:

**All Checkout Measures (Historical)**

Filters: FY Jan Dec: All, FY Feb Jan: All, FY March Feb: All, FY April March: All, FY May April: All, FY June May: All, FY July June: All, FY Aug July: All, FY Sep Aug: All, FY Oct Sep: All, FY Nov Oct: All, FY Dec Nov: All, Station Library: All, Day of Week: All, Hour of Day: All

Item Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Reserve Renewals	Staff Renewals	Patron Renewals	Use Item
All	255,109		103,771	8,167	65	12,379	124,119	
ALCOHOL	323	0.13%	127	13		27	156	
ALCOHOL/NO	91	0.04%	39			8	44	
ALEXANDER	137,463	53.88%	55,123	1,662	5	5,875	73,021	
ANNEX	1,193	0.47%	431			60	702	
ART	3,133	1.23%	1,458	1,146	3	500	26	
CAMDEN	25,186	9.87%	9,920	1,676	32	1,743	10,238	
CHANG	2,488	0.98%	1,062	242	4	97	1,083	
CHEMISTRY	1,310	0.51%	483	26		41	760	
DANA	22,351	8.76%	9,255	457	2	1,456	9,050	
DOUGLASS	16,608	6.51%	6,500	620	1	733	8,748	
HUNGARIAN	31	0.01%	24				7	
KILMER	9,154	3.59%	3,250	786	6	371	4,740	
LSM								

2. Click on a dimension in the dimension pool that you want to use in the report:

**All Checkout Measures (Historical)**

Filters: FY Jan Dec: All, FY Feb Jan: All, FY March Feb: All, FY April March: All, FY May April: All, FY June May: All, FY July June: All, FY Aug July: All, FY Sep Aug: All, FY Oct Sep: All, FY Nov Oct: All, FY Dec Nov: All, Station Library: All, Day of Week: All, Hour of Day: All, User Access: Reserve Desk: Dewey Call Number: LC Call Number: Browse Call Number:

Item Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Reserve Renewals	Staff Renewals	Patron Renewals	Use Item
All	255,109		103,771	8,167	65	12,379	124,119	
ALCOHOL	323	0.13%	127	13		27	156	
ALCOHOL/NO	91	0.04%	39			8	44	
ALEXANDER	137,463	53.88%	55,123	1,662	5	5,875	73,021	
ANNEX	1,193	0.47%	431			60	702	
ART	3,133	1.23%	1,458	1,146	3	500	26	
CAMDEN	25,186	9.87%	9,920	1,676	32	1,743	10,238	
CHANG	2,488	0.98%	1,062	242	4	97	1,083	
CHEMISTRY	1,310	0.51%	483	26		41	760	
DANA	22,351	8.76%	9,255	457	2	1,456	9,050	
DOUGLASS	16,608	6.51%	6,500	620	1	733	8,748	
HUNGARIAN	31	0.01%	24				7	
KILMER								

3. Drag the dimension you want to display to either the rows or columns area in the report.
4. To replace an existing dimension with the dimension you have selected, position the new dimension over the existing dimension so two double arrows display.

If two single arrows display, you can insert the new dimension before (to the left of) or after (to the right of) the current dimension. Only when two double arrows display can you swap the dragged dimension with the current dimension:

Station Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Reserve Renewals	Staff Renewals	Patron Renewals	Use Item
All	255,109		103,771	8,167	65	12,379	124,119	
ALCOHOL	323	0.13%	127	13		27	156	
ALCOHOL/NJ	91	0.04%	39			8	44	
ALEXANDER	137,463	53.88%	55,123	1,662	5	5,875	73,021	
ANNEX	1,193	0.47%	431			60	702	
ART	3,133	1.23%	1,458	1,146	3	500	26	
CAMDEN	25,186	9.87%	9,920	1,676	32	1,743	10,238	
CHANG	2,488	0.98%	1,062	242	4	97	1,083	
CHEMISTRY	1,310	0.51%	483	26		41	760	
DANIA	22,351	8.76%	9,255	457	2	1,456	9,050	
DOUGLASS	16,608	6.51%	6,500	620	1	733	8,748	
HUNGARIAN	31	0.01%	24				7	
KILMER								

5. When you have positioned the new dimension so two double arrows display (to replace existing dimension), unclick to release the new dimension.

It will replace the existing dimension in the report area. The original dimension is moved back to the dimension pool area:

Station Library	Total Circulation	Checkout Item	Checkout Reserve	Reserve Renewals	Staff Renewals	Patron Renewals	Use Item	Library Use Transaction
All	505,143	232,240	15,424	110	22,625	223,758	10,986	7

- Click either the **All** or the **+** next to the All to expand the member list:

**All Checkout Measures (Historical)**

Filters: FY Jan Dec: All, FY Feb Jan: All, FY March Feb: All, FY April March: All, FY May April: All, FY June May: All, FY July June: All, FY Aug July: All, FY Sep Aug: All, FY Oct Sep: All, FY Nov Oct: All, FY Dec Nov: All, Item Library: All, Day of Week: All, Hour of Day: All, User Access: , Reserve Desk: , Dewey Call Number: , LC Call Number: , Browse Call Number: .

Station Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Reserve Renewals	Staff Renewals	Patron Renewals	Use Item
<b>All</b>	505,143		232,240	15,424	110	22,625	223,758	
ALCOHOL	223,934	44.33%	339			23	223,572	
ALEXANDER	108,367	21.45%	96,411	3,244	12	8,699		
ANNEX	641	0.13%	633			8		
ART	10,563	2.09%	7,385	2,811	6	361		
CAMDEN	28,044	5.55%	18,235	2,461	56	2,867		
CHANG	5,144	1.02%	4,163	610	4	367		
CHEMISTRY	1,573	0.31%	1,434	77		62		
DANA	31,627	6.26%	23,662	1,027	1	3,176		
DOUGLASS	19,350	3.83%	17,363	973	4	1,010		
KILMER	10,620	2.10%	8,336	1,032	4	1,248		
LSM	20,844	4.13%	17,404	455	5	2,980		
MATH								

- Click in the box next to the name of the dimension to filter the member list:

**All Checkout Measures (Historical)**

Filters: FY Jan Dec: All, FY Feb Jan: All, FY March Feb: All, FY April March: All, FY May April: All, FY June May: All, FY July June: All, FY Aug July: All, FY Sep Aug: All, FY Oct Sep: All, FY Nov Oct: All, FY Dec Nov: All, Item Library: All, Day of Week: All, Hour of Day: All, User Access: , Reserve Desk: , Dewey Call Number: , LC Call Number: , Browse Call Number: .

Station Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Reserve Renewals	Staff Renewals	Patron Renewals	Use Item
<b>All</b>	505,143		232,240	15,424	110	22,625	223,758	
ALCOHOL	223,934	44.33%	339			23	223,572	
ALEXANDER	108,367	21.45%	96,411	3,244	12	8,699		
ANNEX	641	0.13%	633			8		
ART	10,563	2.09%	7,385	2,811	6	361		
CAMDEN	28,044	5.55%	18,235	2,461	56	2,867		
CHANG	5,144	1.02%	4,163	610	4	367		
CHEMISTRY	1,573	0.31%	1,434	77		62		
DANA	31,627	6.26%	23,662	1,027	1	3,176		
DOUGLASS	19,350	3.83%	17,363	973	4	1,010		
KILMER	10,620	2.10%	8,336	1,032	4	1,248		
LSM	20,844	4.13%	17,404	455	5	2,980		
MATH								

A list displays with a Levels tab and a Members tab.

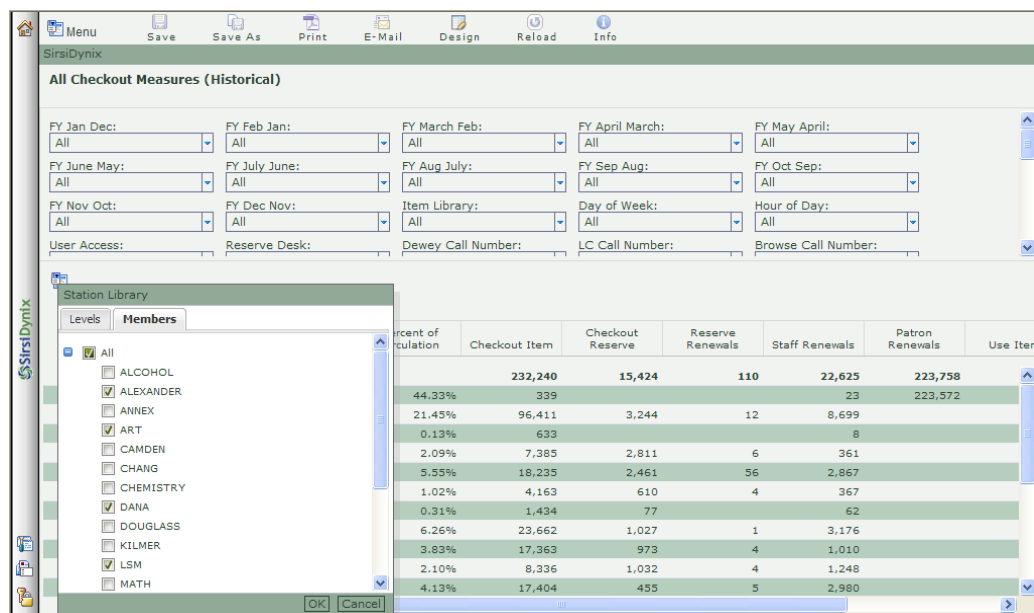
- Use the Levels tab to select or deselect all of a level.
- Use the members tab to select or deselect certain members within a level.

---

When you are working on the Members tab and the dimension is on the row, you need to collapse the All level to change the member list from All to None or back again.

---

- 
- All
 Indicates that if you were to expand All, all of the members will be selected by default.
  
  - All
 Indicates that if you were to expand All, none of the members will be selected by default.
  
  - All
 Indicates that if you were to expand All, some of the members will be selected, but not the All member.
  
  - All
 Indicates that if you were to expand All, some of the members will be selected, as well as the All member.
- 



10. Click **OK**.

The new report appears:

**All Checkout Measures (Historical)**

Filters: FY Jan Dec: All, FY Feb Jan: All, FY March Feb: All, FY April March: All, FY May April: All, FY June May: All, FY July June: All, FY Aug July: All, FY Sep Aug: All, FY Oct Sep: All, FY Nov Oct: All, FY Dec Nov: All, Item Library: All, Day of Week: All, Hour of Day: All, User Access: , Reserve Desk: , Dewey Call Number: , LC Call Number: , Browse Call Number:

Station Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Reserve Renewals	Staff Renewals	Patron Renewals	Use Item
<b>All</b>	<b>255,109</b>		<b>103,771</b>	<b>8,167</b>	<b>65</b>	<b>12,379</b>	<b>124,119</b>	<b>6</b>
ALEXANDER	49,173	19.28%	42,094	1,378	8	3,915		1
ART	6,176	2.42%	4,107	1,334	4	731		
DANA	15,220	5.97%	10,696	463	3	1,928		2
LSM	10,176	3.99%	7,895	345	12	1,924		

Notice that the All total is the total for all the members, even though you had excluded some.

- To exclude the total line in the report area, click in the box next to the name of the dimension to filter the member list and deselect the check box next to All:

**All Checkout Measures (Historical)**

Filters: FY Jan Dec: All, FY Feb Jan: All, FY March Feb: All, FY April March: All, FY May April: All, FY June May: All, FY July June: All, FY Aug July: All, FY Sep Aug: All, FY Oct Sep: All, FY Nov Oct: All, FY Dec Nov: All, Item Library: All, Day of Week: All, Hour of Day: All, User Access: , Reserve Desk: , Dewey Call Number: , LC Call Number: , Browse Call Number:

**Station Library**

Levels: Members

- ☐ All
- ☐ ALCOHOL
- ☒ ALEXANDER
- ☐ ANNEX
- ☒ ART
- ☐ CAMDEN
- ☐ CHANG
- ☐ CHEMISTRY
- ☒ DANA
- ☐ DOUGLASS
- ☐ KILMER
- ☒ LSM
- ☐ MATH

Station Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Reserve Renewals	Staff Renewals	Patron Renewals	Use Item
ALEXANDER	49,173	19.28%	42,094	1,378	8	3,915		1
ART	6,176	2.42%	4,107	1,334	4	731		
DANA	15,220	5.97%	10,696	463	3	1,928		2
LSM	10,176	3.99%	7,895	345	12	1,924		

- Click **OK**.

The new report appears, without the total line:

SirsiDynix

**All Checkout Measures (Historical)**

FY Jan Dec: All  
 FY Feb Jan: All  
 FY March Feb: All  
 FY April March: All  
 FY May April: All  
 FY June May: All  
 FY July June: All  
 FY Aug July: All  
 FY Sep Aug: All  
 FY Oct Sep: All  
 FY Nov Oct: All  
 FY Dec Nov: All  
 Item Library: All  
 Day of Week: All  
 Hour of Day: All  
 User Access: Reserve Desk: Dewey Call Number: LC Call Number: Browse Call Number:

Measures

Station Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Reserve Renewals	Staff Renewals	Use Item	Library Us Transaction
ALEXANDER	49,173	19.28%	42,094	1,378	8	3,915	1,778	
ART	6,176	2.42%	4,107	1,334	4	731		
DANA	15,220	5.97%	10,696	463	3	1,928	2,130	
LSM	10,176	3.99%	7,895	345	12	1,924		1

### To include more than one dimension in a report

1. Click the dimension in the dimension pool that you want to use and drag it to the rows or columns area in the report where you want it to display.
2. To insert the new dimension above (before) or below (after) the current dimension, position the new dimension over the existing dimension so two single arrows display to the left (before) or right (after) of the current dimension:

SirsiDynix

**All Checkout Measures (Historical)**

FY Jan Dec: All  
 FY Feb Jan: All  
 FY March Feb: All  
 FY April March: All  
 FY May April: All  
 FY June May: All  
 FY July June: All  
 FY Aug July: All  
 FY Sep Aug: All  
 FY Oct Sep: All  
 FY Nov Oct: All  
 FY Dec Nov: All  
 Item Library: All  
 Day of Week: All  
 Hour of Day: All  
 User Access: Reserve Desk: Dewey Call Number: LC Call Number: Browse Call Number:

Measures

Station	Day of Week	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Reserve Renewals	Staff Renewals	Use Item	Library Us Transaction
ALEXANDER		49,173	19.28%	42,094	1,378	8	3,915	1,778	
ART		6,176	2.42%	4,107	1,334	4	731		
DANA		15,220	5.97%	10,696	463	3	1,928	2,130	
LSM		10,176	3.99%	7,895	345	12	1,924		1

### 3. Release the new dimension.

It appears above (if dropped to the left) or below (if dropped to the right) of the original dimension, as you selected:

Station Library	Measures	Total Circulation	Checkout Item	Checkout Reserve	Reserve Renewals	Staff Renewals	Use Item	Library Use Transactions
ALEXANDER	All	49,173	42,094	1,378	8	3,915	1,778	42
ART	All	6,176	4,107	1,334	4	731		1
DANA	All	15,220	10,696	463	3	1,928	2,130	11
LSM	All	10,176	7,895	345	12	1,924		1,723

- Click in the check box next to the name of the new dimension to filter the member list.
- Deselect the check box next to All.
- Click **OK** to automatically expand the member list under each library.

The new report appears:

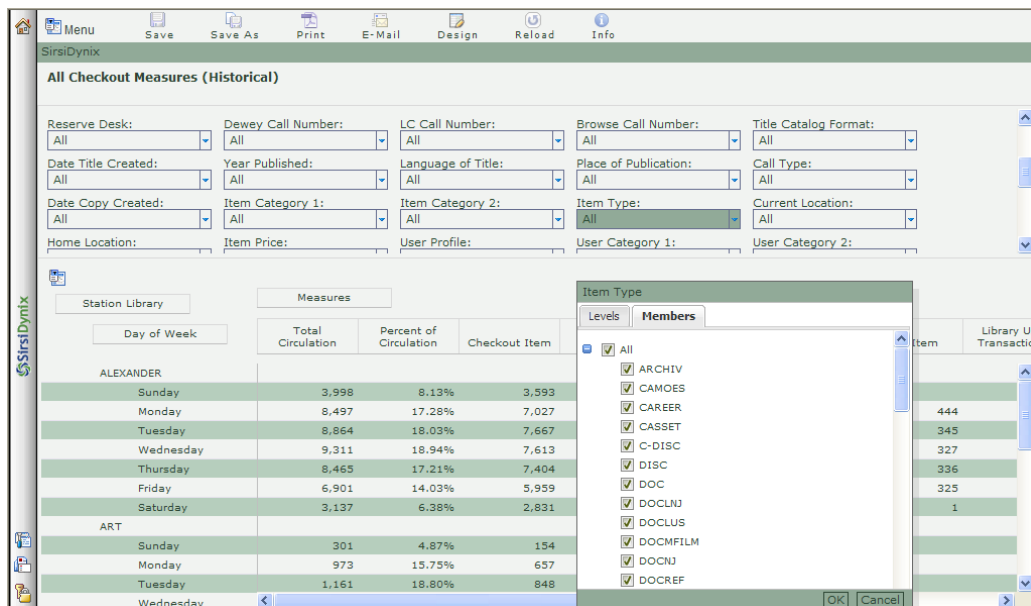
Station Library	Measures	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Reserve Renewals	Staff Renewals	Use Item	Library Use Transactions
ALEXANDER	Sunday	3,998	8.13%	3,593	154	5		246	
ALEXANDER	Monday	8,497	17.28%	7,027	292	1		733	444
ALEXANDER	Tuesday	8,864	18.03%	7,667	228	2		622	345
ALEXANDER	Wednesday	9,311	18.94%	7,613	295		1,076		327
ALEXANDER	Thursday	8,465	17.21%	7,404	218			507	336
ALEXANDER	Friday	6,901	14.03%	5,959	128			489	325
ALEXANDER	Saturday	3,137	6.38%	2,831	63			242	1
ART	Sunday	301	4.87%	154	138			9	
ART	Monday	973	15.75%	657	254			62	
ART	Tuesday	1,161	18.80%	848	274	1		38	

You can use this same technique to add multiple dimensions to columns.

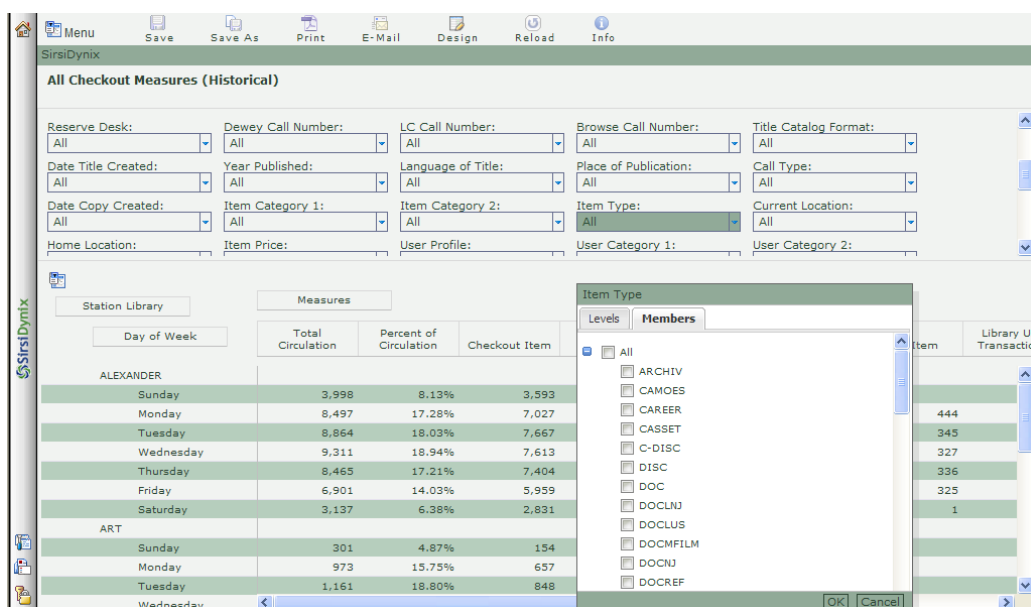
### ***To limit a dimension in the dimension pool***

Another way to further customize your report is to limit a dimension in the dimension pool. While in the dimension pool, the default is set to look at all members of all dimensions. To limit a dimension:

1. Click the down arrow to the right of a dimension:



When you are viewing member lists in the limit pool, you can use the All checkmark to turn all of the members on or off without having to expand and collapse:



2. Select as many dimensions in the list as you want to limit by.
3. Click **OK**:

The screenshot shows the SirsiDynix 'All Checkout Measures (Historical)' window. The 'Item Type' dialog box is open, displaying a list of item types with checkboxes. The 'Members' tab is selected, and the following item types are checked: ARCHIV, CASSET, C-DISC, DISC, DOC, DOCLN, DOCLUS, DOCMFILM, DOCNJ, and DOCREP. The background window shows a table with columns for Day of Week, Total Circulation, Percent of Circulation, and Checkout Item. The table is filtered by 'Item Type'.

Day of Week	Total Circulation	Percent of Circulation	Checkout Item
<b>ALEXANDER</b>			
Sunday	3,998	8.13%	3,593
Monday	8,497	17.28%	7,027
Tuesday	8,864	18.03%	7,667
Wednesday	9,311	18.94%	7,613
Thursday	8,465	17.21%	7,404
Friday	6,901	14.03%	5,959
Saturday	3,137	6.38%	2,831
<b>ART</b>			
Sunday	301	4.87%	154
Monday	973	15.75%	657
Tuesday	1,161	18.80%	848
Wednesday			

The selected members display in the dimension pool and the data in the grid reflects the selections. Notice that when limiting is done in the dimension pool, the totals only tally those members selected:

The screenshot shows the SirsiDynix 'All Checkout Measures (Historical)' window. The 'Item Type' dialog box is open, displaying a list of item types with checkboxes. The 'Members' tab is selected, and the following item types are checked: ARCHIV, CASSET, C-DISC, DISC, DOC, DOCLN, DOCLUS, DOCMFILM, DOCNJ, and DOCREP. The background window shows a table with columns for Day of Week, Total Circulation, Percent of Circulation, Checkout Item, Checkout Reserve, Reserve Renewals, Staff Renewals, Use Item, and Library Us Transaction. The table is filtered by 'Item Type'.

Day of Week	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Reserve Renewals	Staff Renewals	Use Item	Library Us Transaction
<b>ALEXANDER</b>								
Monday	656	21.44%	219			2	435	
Tuesday	608	19.88%	279			1	328	
Wednesday	511	16.70%	197				314	
Thursday	552	18.05%	225	1			326	
Friday	724	23.67%	400			3	321	
Saturday	8	0.26%	7			1		
<b>ART</b>								
Monday	3	12.00%	2				1	
Tuesday	8	32.00%	8					
Wednesday	6	24.00%	6					
Thursday	4	16.00%	3	1				
Friday								

## Title Lists in Reports

An embedded feature of Director's Station allows you to display detailed lists that are associated with the values in the cells selected. Lists are available in reports created from most of the cubes. Refer to the Online Help for information about each of the lists that are available.

### List Copies by Total Circulation

#### To create a title list

1. From the Dashboard, click an existing report such as All Checkout Measures (Historical).

You can use a delivered report or one that you have created from one of the delivered reports.

---

An Administrator can create new reports by browsing the cube and saving the result as a report. However, **any report that is created this way will not contain links to detailed lists.**

---



---

All Checkout Measures (Historical) and All OPAC Measures require you to select a date prior to selecting a detailed list.

---

2. If you are using All Checkout Measures (Historical) or All OPAC Measures, or if you want to only get details for a specific date range, select a date or dates in any one of the FY or calendar year dimensions:

Menu
 Save
 Save As
 Print
 E-Mail
 Design
 Reload
 Info

SirsiDynix

## All Checkout Measures (Historical)

FY Jan Dec:

All

FY Feb Jan:

All

FY March Feb:

All

FY April March:

All

FY May April:

All

FY Aug July:

All

FY Sep Aug:

All

FY Oct Sep:

All

Station Library:

All

Day of Week:

All

Hour of Day:

All

Dewey Call Number:

LC Call Number:

Browse Call Number:

Levels Members

- ☒ All
- ☒ 2008

OK Cancel

Percent of Circulation	Checkout Item	Checkout Reserve	Reserve Renewals	Staff Renewals	Patron Renewals	Use Item
	103,771	8,167	65	12,379	124,119	
0.13%	127	13		27	156	
0.04%	39			8	44	
53.88%	55,123	1,662	5	5,875	73,021	
0.47%	431			60	702	
1.23%	1,458	1,146	3	500	26	
9.87%	9,920	1,676	32	1,743	10,238	
25.186						
CAMDEN	2,488	0.98%	1,062	242	4	97
CHANG	1,310	0.51%	483	26	41	760
CHEMISTRY	22,351	8.76%	9,255	457	2	1,456
DANA	16,608	6.51%	6,500	620	1	733
DOUGLASS	31	0.01%	24			7
HUNGARIAN						
KILMER						

- Highlight one or more data cells by positioning your cursor at the upper-left corner of the cell at the beginning of your selection and dragging it to the lower right corner of the cell at the end of your selection.

The **Select** menu appears.

- Click the **List Copies by Total Circulation** selection:

The screenshot shows the SirsiDynix interface with the 'All Checkout Measures (Historical)' window. A table lists various items with columns for 'Total Circulation', 'Percent of Circulation', 'Checkout Item', 'Checkout Reserve', 'Reserve Renewals', 'Staff Renewals', 'Patron Renewals', and 'Use Item'. A context menu is open over the 'Total Circulation' column, showing options like 'Chart Selection', 'Create a Meter', 'List Copies by Total Circulation', '500 Most Popular Titles', 'List Inhouse Use Titles', and 'List Library Use Transactions'. The 'List Copies by Total Circulation' option is highlighted.

The formatted list of copies with the most checkouts opens in a new window.

- Click the icon in the top-right corner of the window to close the window:

The screenshot shows the 'List Copies by Total Circulation' window. It displays a table with columns: 'Checkouts and Renewals', 'Title', 'Author', 'Call Number', 'Item ID', 'Year Published', and 'Date Copy Created'. The table lists 16 entries, each with a row number and a corresponding book title and author. The window has a standard menu bar at the top and a status bar at the bottom.

Detailed lists take more time to load if the selected cells have large values. Only one hundred entries are listed at a time. You can page through the list, print to PDF, or export to Excel.

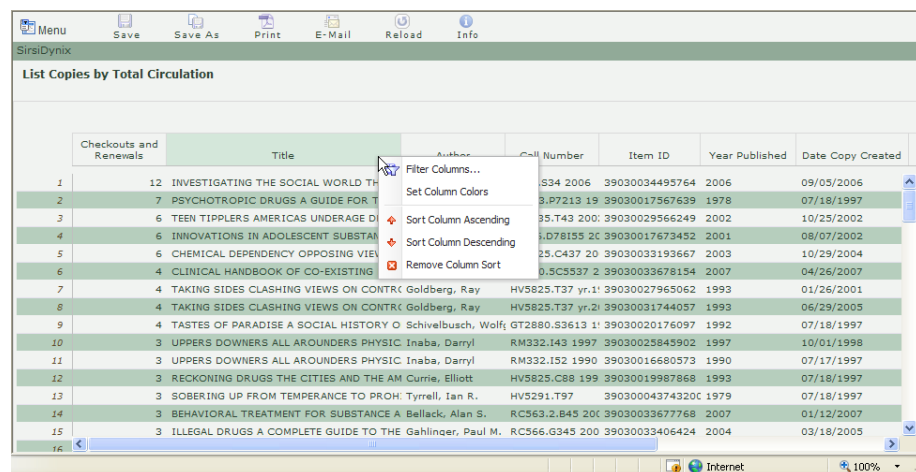
## Filtering and Sorting Columns that Display

If you are looking for specific values within the columns of your report, whether it is an All ... Measures report or a detailed list, you can filter by column or sort columns by ascending or descending values.

### To filter columns of a report

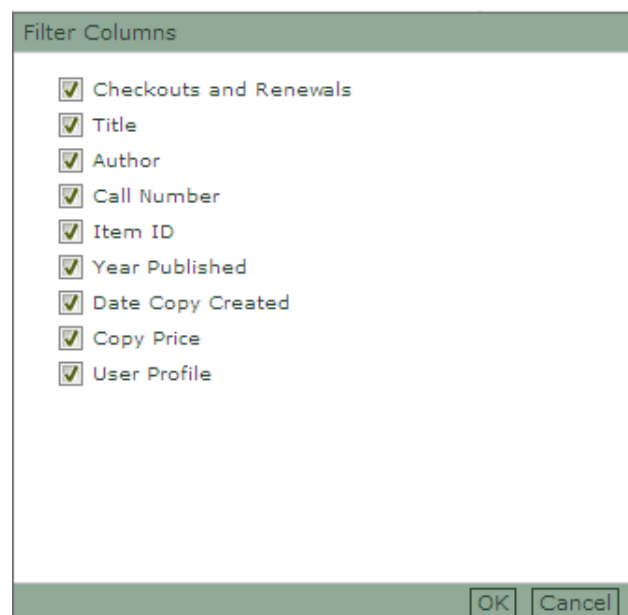
1. Display a report.
2. Click in an empty space next to the column title.

The menu appears:

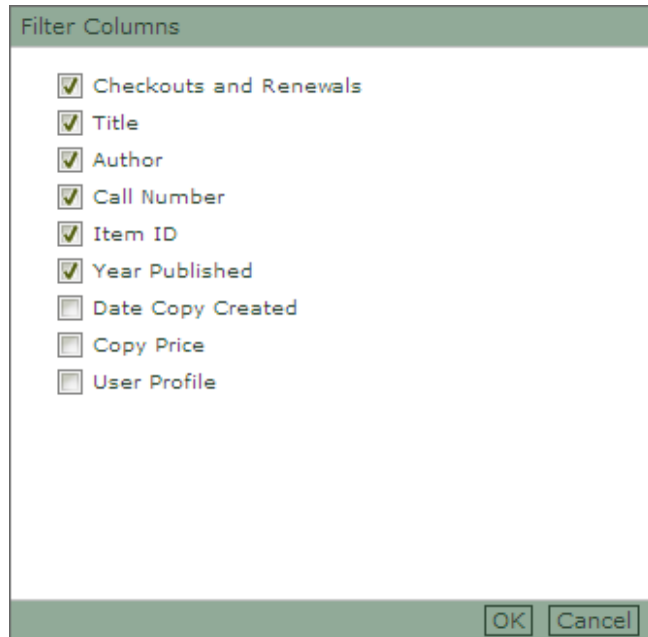


3. Click **Filter Columns**.

The dialog appears:



4. Check the columns you want to display, and un-check the columns you do not want to display:

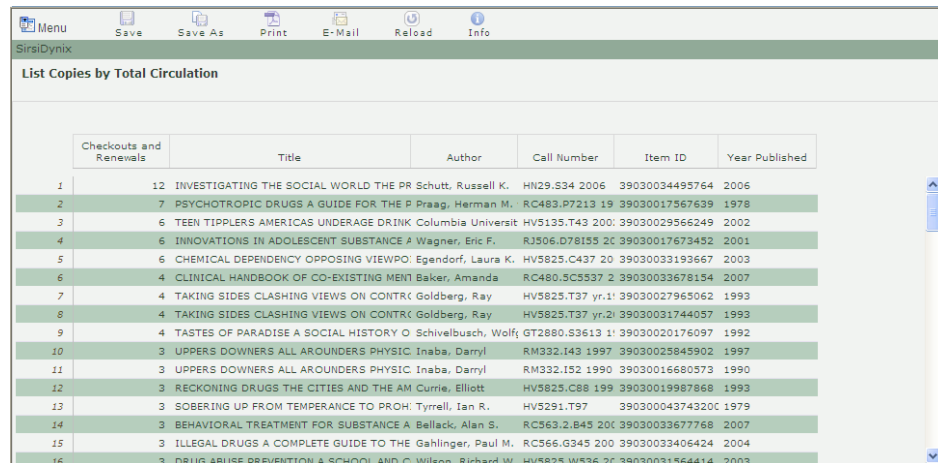


A dialog box titled "Filter Columns" with a list of columns and checkboxes. The columns are: Checkouts and Renewals, Title, Author, Call Number, Item ID, Year Published, Date Copy Created, Copy Price, and User Profile. The first six are checked, and the last three are unchecked. At the bottom right are "OK" and "Cancel" buttons.

Column	Checked
Checkouts and Renewals	Yes
Title	Yes
Author	Yes
Call Number	Yes
Item ID	Yes
Year Published	Yes
Date Copy Created	No
Copy Price	No
User Profile	No

5. Click **OK**.

The new report appears:

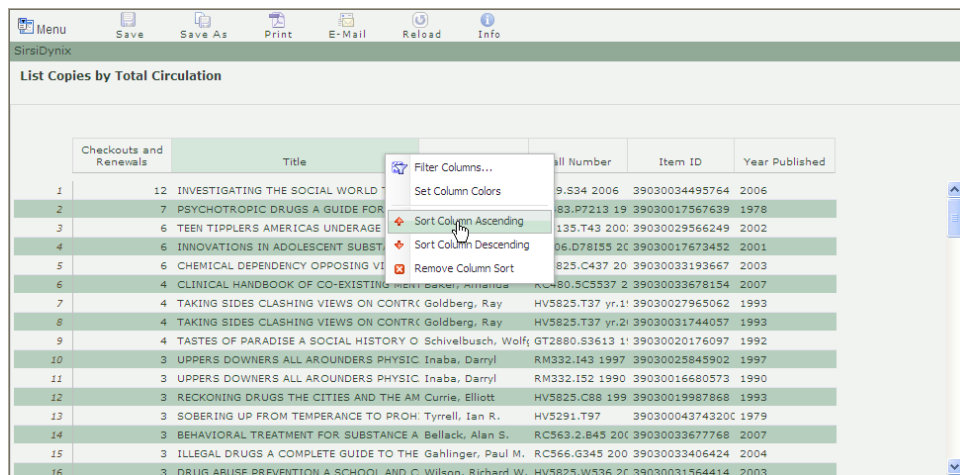


A screenshot of a web application showing a report titled "List Copies by Total Circulation". The report is displayed in a table with columns: Checkouts and Renewals, Title, Author, Call Number, Item ID, and Year Published. The table contains 16 rows of data, each representing a different book and its circulation statistics.


	Checkouts and Renewals	Title	Author	Call Number	Item ID	Year Published
1	12	INVESTIGATING THE SOCIAL WORLD THE PR	Schutt, Russell K.	HN29.S34 2006	39030034495764	2006
2	7	PSYCHOTROPIC DRUGS A GUIDE FOR THE P	Praag, Herman M.	RC483.P7213 19	39030017567639	1978
3	6	TEEN TIPPLERS AMERICAS UNDERAGE DRINK	Columbia Universit	HV5135.T43 200	39030029566249	2002
4	6	INNOVATIONS IN ADOLESCENT SUBSTANCE A	Wagner, Eric F.	RJ506.D78155 2C	39030017673452	2001
5	6	CHEMICAL DEPENDENCY OPPOSING VIEWPO	Egendorf, Laura K.	HV5825.C437 20	3903003193667	2003
6	4	CLINICAL HANDBOOK OF CO-EXISTING MENT	Baker, Amanda	RC480.5C5537 2	39030033678154	2007
7	4	TAKING SIDES CLASHING VIEWS ON CONTR	Goldberg, Ray	HV5825.T37 yr.1	39030027965062	1993
8	4	TAKING SIDES CLASHING VIEWS ON CONTR	Goldberg, Ray	HV5825.T37 yr.2	39030031744057	1993
9	4	TASTES OF PARADISE A SOCIAL HISTORY O	Schivelbusch, Wolff	GT2880.S3613 1	39030020176097	1992
10	3	UPPERS DOWNERS ALL AROUNDERS PHYSIC	Inaba, Darryl	RM332.I43 1997	39030025845902	1997
11	3	UPPERS DOWNERS ALL AROUNDERS PHYSIC	Inaba, Darryl	RM332.I52 1990	39030016680573	1990
12	3	RECKONING DRUGS THE CITIES AND THE AM	Currie, Elliott	HV5825.C88 199	39030019987868	1993
13	3	SOBERING UP FROM TEMPERANCE TO PROH	Tyrnell, Ian R.	HV5291.T97	39030004374320C	1979
14	3	BEHAVIORAL TREATMENT FOR SUBSTANCE A	Bellack, Alan S.	RC563.2.B45 20C	39030033677768	2007
15	3	ILLEGAL DRUGS A COMPLETE GUIDE TO THE	Gahlinger, Paul M.	RC566.G345 200	39030033406424	2004
16	3	DRUG ABUSE PREVENTION A SCHOOL AND C	Wilson, Richard W.	HV5825.W536 2C	39030031564414	2003

### To sort values within a column

1. Select a report from the Dashboard, or continue working with the detailed list report.
2. Click in an empty space next to the title of the column you want to sort.
3. Click **Sort Column Ascending** or **Sort Column Descending**, as desired:



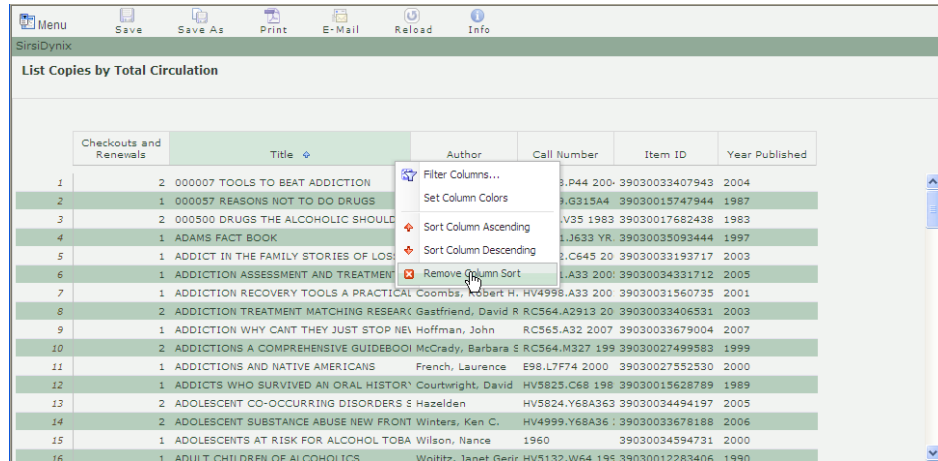
4. The new report appears with the column sorted as specified.

A small up or down arrow  appears next to the title of the sorted column indicating which column is sorted and whether the sort is ascending or descending:

Checkouts and Renewals	Title	Author	Call Number	Item ID	Year Published
1	2 000007 TOOLS TO BEAT ADDICTION	Peele, Stanton	HV4998.P44 200	39030033407943	2004
2	1 000057 REASONS NOT TO DO DRUGS	Kirsch, M. M.	NC1429.G315A4	39030015747944	1987
3	2 000500 DRUGS THE ALCOHOLIC SHOULD A	Van Almen, William	RM146.V35 1983	39030017682438	1983
4	1 ADAMS FACT BOOK	Adams Media Inc	HD9351.J633 YR.	39030035093444	1997
5	1 ADDICT IN THE FAMILY STORIES OF LOSS	H Conyers, Beverly	HV5132.C645 20	39030033193717	2003
6	1 ADDICTION ASSESSMENT AND TREATMENT	W Hilarski, Carolyn	HV1421.A33 200	39030034331712	2005
7	1 ADDICTION RECOVERY TOOLS A PRACTICAL	Coombs, Robert H.	HV4998.A33 200	39030031560735	2001
8	2 ADDICTION TREATMENT MATCHING RESEAR	Gastfriend, David R	RC564.A2913 20	39030033406531	2003
9	1 ADDICTION WHY CANT THEY JUST STOP	NEL Hoffman, John	RC565.A32 2007	39030033679004	2007
10	2 ADDICTIONS A COMPREHENSIVE GUIDEBOOK	McCready, Barbara S	RC564.M327 199	39030027499583	1999
11	1 ADDICTIONS AND NATIVE AMERICANS	French, Laurence	E98.L7F74 2000	39030027552530	2000
12	1 ADDICTS WHO SURVIVED AN ORAL HISTOR	Courtwright, David	HV5825.C68 198	39030015628789	1989
13	2 ADOLESCENT CO-OCCURRING DISORDERS	S Hazelden	HV5824.Y68A363	39030034494197	2005
14	2 ADOLESCENT SUBSTANCE ABUSE NEW FRONT	Winters, Ken C.	HV4999.Y68A36	39030033678188	2006
15	1 ADOLESCENTS AT RISK FOR ALCOHOL TOB	Wilson, Nance	1960	39030034594731	2000
16	1 ADULT CHALLENGE OF ALCOHOLICS	Wolitz, Tanah Raric	HV5132.W64 198	39030012283406	1990

5. To remove the column sort, click in the empty space of the column title again.

## 6. Click Remove Column Sort:

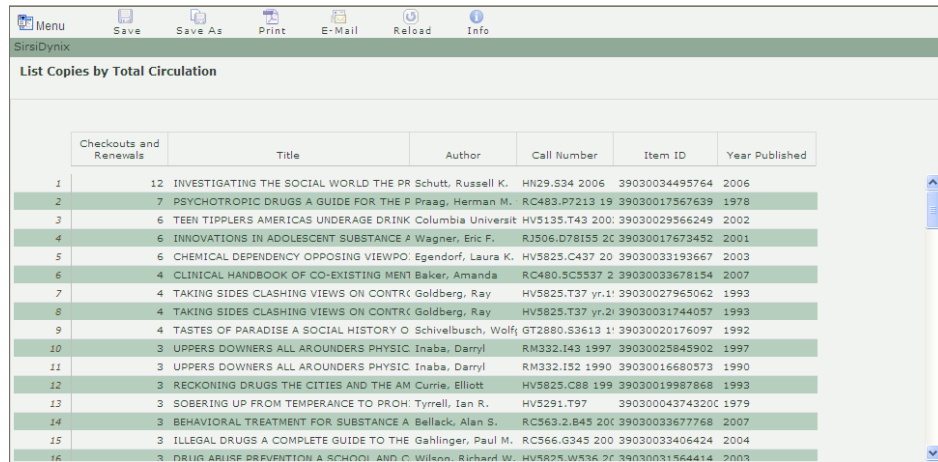


SirsiDynix

List Copies by Total Circulation

Checkouts and Renewals	Title	Author	Call Number	Item ID	Year Published
1	2	000007 TOOLS TO BEAT ADDICTION	3.P44 200-	39030033407943	2004
2	1	000057 REASONS NOT TO DO DRUGS	3.G315A4	39030015747944	1987
3	2	000500 DRUGS THE ALCOHOLIC SHOULD	3.V35 1983	39030017682438	1983
4	1	ADAMS FACT BOOK	3.J633 YR.	39030035093444	1997
5	1	ADDICT IN THE FAMILY STORIES OF LOS	3.C645 20	39030033193717	2003
6	1	ADDICTION ASSESSMENT AND TREATMENT	3.A33 200-	39030034331712	2005
7	1	ADDICTION RECOVERY TOOLS A PRACTICAL	Coombs, Robert H. HV4998.A33 200	39030031560735	2001
8	2	ADDICTION TREATMENT MATCHING RESEARCH	Gastfriend, David R RC564.A2913 20	39030033406531	2003
9	1	ADDICTION WHY CAN'T THEY JUST STOP NEV	Hoffman, John RC565.A32 2007	39030033679004	2007
10	2	ADDICTIONS A COMPREHENSIVE GUIDEBOOK	McCready, Barbara S RC564.M327 199	39030027499583	1999
11	1	ADDICTIONS AND NATIVE AMERICANS	French, Laurence E98.L7F74 2000	39030027552530	2000
12	1	ADDICTS WHO SURVIVED AN ORAL HISTOR	Courtwright, David HV5825.C68 198	39030015628789	1989
13	2	ADOLESCENT CO-OCCURRING DISORDERS &	Hazelden HV5824.Y68A363 39030034494197	2005	
14	2	ADOLESCENT SUBSTANCE ABUSE NEW FRONT	Winters, Ken C. HV4999.Y68A36 : 39030033678188	2006	
15	1	ADOLESCENTS AT RISK FOR ALCOHOL TOB	Wilson, Nance 1960	39030034594731	2000
16	1	ADULT CHILDREN OF ALCOHOLICS	Wolitz, Janet Gorr HV5132.W64 195	39030012283406	1990

The report returns to its original appearance:



SirsiDynix

List Copies by Total Circulation

Checkouts and Renewals	Title	Author	Call Number	Item ID	Year Published
1	12	INVESTIGATING THE SOCIAL WORLD THE PR	Schutt, Russell K. HN29.S34 2006	39030024495764	2006
2	7	PSYCHOTROPIC DRUGS A GUIDE FOR THE P	Praag, Herman M. RC483.P7213 19	39030017567639	1978
3	6	TEEN TIPPLERS AMERICAS UNDERAGE DRINK	Columbia Universit HV5135.T43 200-	39030029566249	2002
4	6	INNOVATIONS IN ADOLESCENT SUBSTANCE A	Wagner, Eric F. RJ506.D78155 2C	39030017673452	2001
5	6	CHEMICAL DEPENDENCY OPPOSING VIEWPO	Egendorf, Laura K. HV5825.C437 20	39030033193667	2003
6	4	CLINICAL HANDBOOK OF CO-EXISTING MEN	Baker, Amanda RC480.5C5537 2	39030033678154	2007
7	4	TAKING SIDES CLASHING VIEWS ON CONTR	Goldberg, Ray HV5825.T37 yr.1	39030027965062	1993
8	4	TAKING SIDES CLASHING VIEWS ON CONTR	Goldberg, Ray HV5825.T37 yr.2	39030031744057	1993
9	4	TASTES OF PARADISE A SOCIAL HISTORY O	Schivelbusch, Wolf GT2880.S3613 1	39030020176097	1992
10	3	UPPERS DOWNERS ALL AROUNDERS PHYSIC	Inaba, Darryl RM332.I43 1997	39030025845902	1997
11	3	UPPERS DOWNERS ALL AROUNDERS PHYSIC	Inaba, Darryl RM332.I52 1990	39030016680573	1990
12	3	RECKONING DRUGS THE CITIES AND THE AM	Currie, Elliott HV5825.C88 199	39030019987868	1993
13	3	SOBERING UP FROM TEMPERANCE TO PROH	Tyrell, Ian R. HV5291.T97	39030004374320C	1979
14	3	BEHAVIORAL TREATMENT FOR SUBSTANCE A	Bellack, Alan S. RC563.2.B45 20C	39030033677768	2007
15	3	ILLEGAL DRUGS A COMPLETE GUIDE TO THE	Gahlinger, Paul M. RC566.G345 200	39030033406424	2004
16	3	DRUG ABUSE PREVENTION A SCHOOL AND C	Wilson, Richard W. HV5829.W536 2C	39030031564414	2003

## Filter Feature in Reports

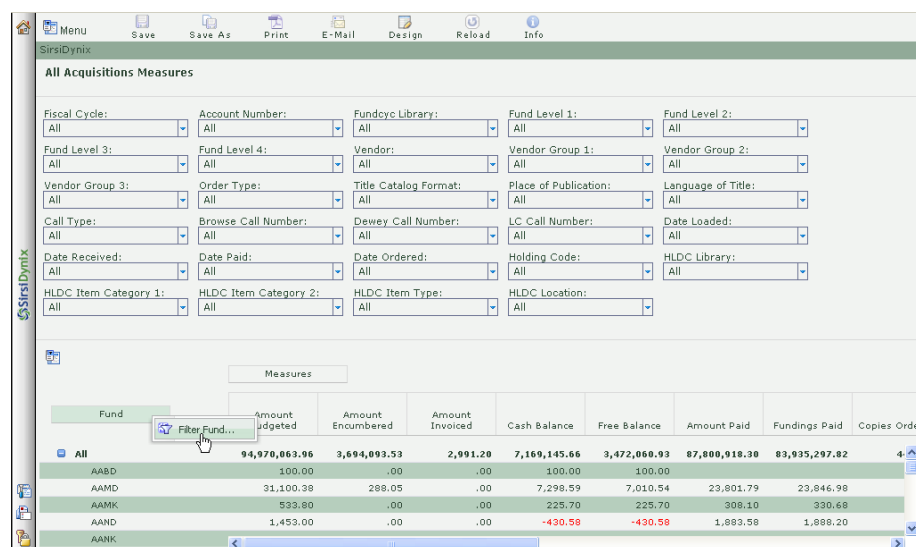
Another embedded feature in Director's Station is to filter for specific dimension members. This lookup is useful when you have a lot of members in a dimension and you want to find specific members only.

### To use Filter on the rows in reports

1. From the Dashboard, click an existing report.

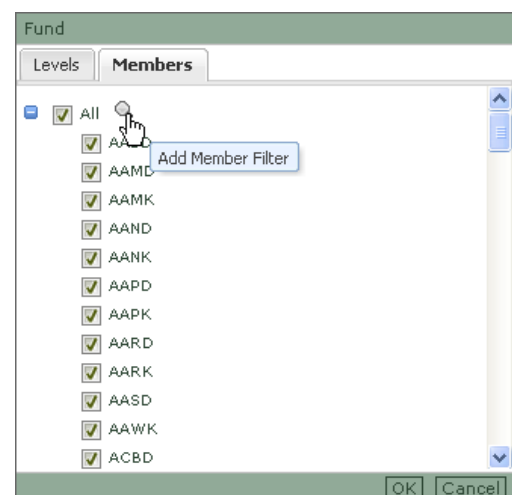
You can use a delivered report or one that you have created.

2. Click in the box containing the name of the dimension on the row:



A filter box displays.

3. Hover next to the All member and click on the magnifying glass that displays:



A Member Filter box displays:

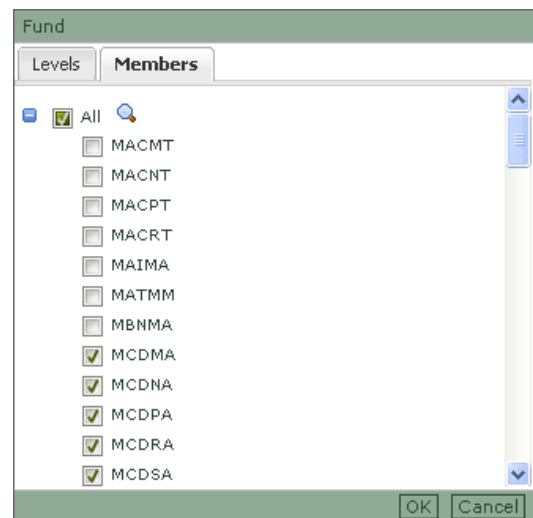
The screenshot shows the SirsiDynix 'All Acquisitions Measures' window. A 'Member Filter' dialog box is open, allowing users to filter members based on their children. The dialog box has two tabs: 'Levels' and 'Members'. The 'Members' tab is active, showing a list of members with checkboxes next to them. The 'Filter Children Of Member' dropdown is set to 'All', and the 'Where Children' dropdown is set to 'Begins With' with the value 'M' entered. The background window shows a table of financial data for various fund levels and categories.

	Free Balance	Amount Paid	Fundings Paid	Copies Order
All	94,970,063.00	3,472,060.93	87,800,918.30	83,935,297.82
AABD	100.00	.00	100.00	100.00
AAMD	31,100.38	288.05	7,298.59	23,801.79
AAMK	533.80	.00	225.70	308.10
AAND	1,453.00	.00	-430.58	1,883.58
AANK				1,888.20

4. For a single level dimension, leave All in the Filter Children of Member box and select the value you want the children to contain in the Where Children box:
5. Click **OK** to display the members you selected:

The screenshot shows the 'Fund' window with the 'Members' tab selected. A list of members is displayed, each with a checkbox next to it. The 'All' checkbox is checked, and the list includes MACMT, MACNT, MACPT, MACRT, MAIMA, MATMM, MBNMA, MCDMA, MCDNA, MCDPA, MCDRA, and MCDSA. The 'OK' and 'Cancel' buttons are at the bottom right.

6. Click **OK** to accept the filtered values, or continue to refine the display using the checkboxes next to each member before you click OK:



The values you select appear in the report:

SirsiDynix

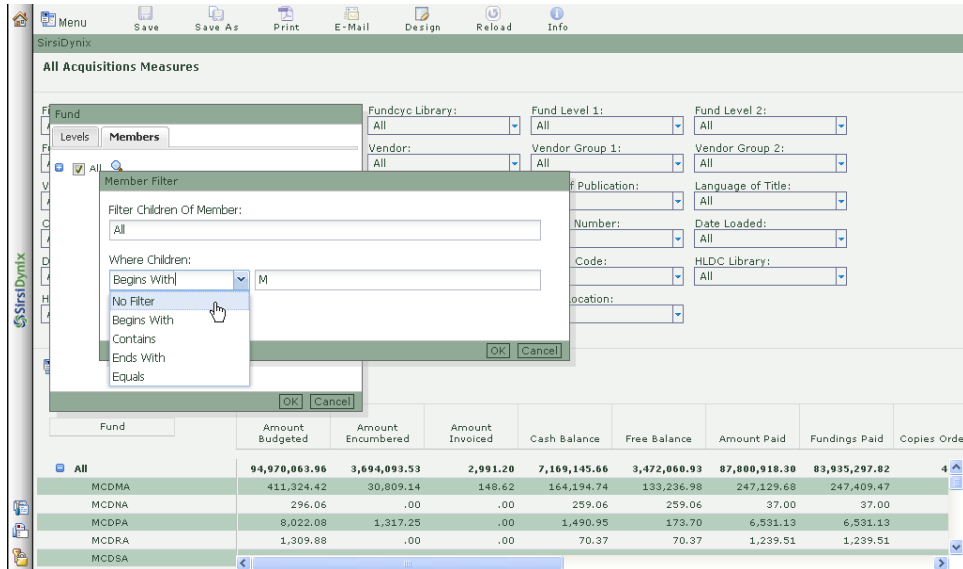
**All Acquisitions Measures**

Fiscal Cycle: All Account Number: All Fundsys Library: All Fund Level 1: All Fund Level 2: All  
Fund Level 3: All Fund Level 4: All Vendor: All Vendor Group 1: All Vendor Group 2: All  
Vendor Group 3: All Order Type: All Title Catalog Format: All Place of Publication: All Language of Title: All  
Call Type: All Browse Call Number: All Dewey Call Number: All LC Call Number: All Date Loaded: All  
Date Received: All Date Paid: All Date Ordered: All Holding Code: All HLDC Library: All  
HLDC Item Category 1: All HLDC Item Category 2: All HLDC Item Type: All HLDC Location: All

Measures

Fund	Amount Budgeted	Amount Encumbered	Amount Invoiced	Cash Balance	Free Balance	Amount Paid	Fundings Paid	Copies Order
All	94,970,063.96	3,694,093.53	2,991.20	7,169,145.66	3,472,060.93	87,800,910.30	83,935,297.82	4
MCDMA	411,324.42	30,809.14	148.62	164,194.74	133,236.98	247,129.68	247,409.47	
MCDNA	296.06	.00	.00	259.06	259.06	37.00	37.00	
MCDPA	8,022.08	1,317.25	.00	1,490.95	173.70	6,531.13	6,531.13	
MCDRA	1,309.88	.00	.00	70.37	70.37	1,239.51	1,239.51	
MCDSA								

- To remove the filter, use the same steps to display the filter Member Filters box, set the filter to No Filter and click **OK** twice:



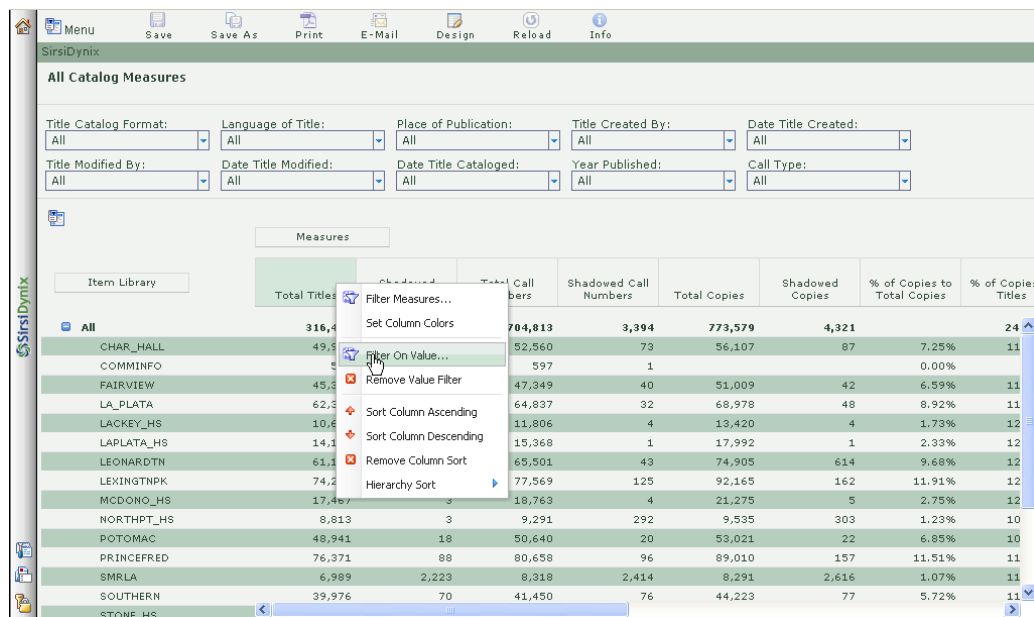
You can also use the Member Filter in the dimension pool. Just click the down-arrow to the right of the dimension name to open the limit box. Hover to the right of the All member and click on the Add Member Filter magnifying glass to display the Member Filter box. You must actively select or deselect member checkboxes to change the filtered values here, but you can redisplay the Member Filter as many times as is necessary to look up each member you want to filter by.

### ***To use Value On Filter on data values in reports***

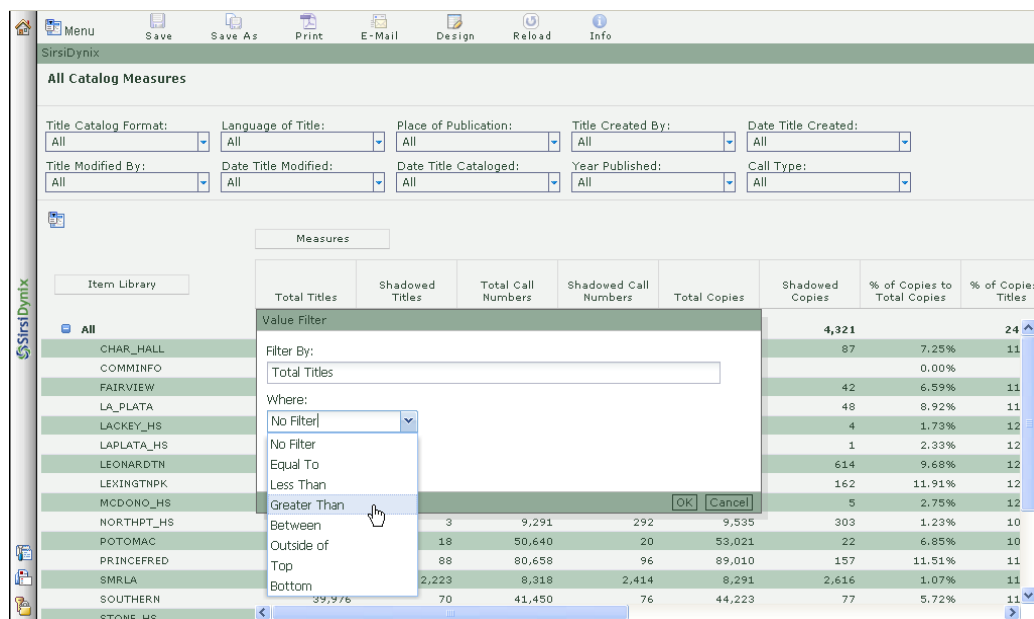
1. From the Dashboard, click an existing report.

You can use a delivered report or one that you have created.

2. Click in the column header of the column you want to filter.
3. Select **Filter On Value**:



A value filter box displays:



4. Select an operation in the Where box.

5. Enter a value in the box if it is presented.

6. Apply to all levels:

Value Filter

Filter By: Total Titles

Where: Greater Than 45000

apply\_to\_levels: all\_levels

OK Cancel

Item Library	Total Titles	Shadowed Titles	Total Call Numbers	Shadowed Call Numbers	Total Copies	Shadowed Copies	% of Copies to Total Copies	% of Copies Titles
All	4,321							24
CHAR_HALL	87						7.25%	11
FAIRVIEW	42						6.59%	11
LA_PLATA	48						8.92%	11
LACKEY_HS	4						1.73%	12
LAPLATA_HS	1						2.33%	12
LEONARDTN	614						9.68%	12
LEXINGTONPK	162						11.91%	12
MCDONO_HS	5						2.75%	12
NORTHPT_HS	303						1.23%	10
POTOMAC	48,941	18	50,640	20	53,021	22	6.85%	10
PRINCFRED	76,371	88	80,658	96	89,010	157	11.51%	11
SMRLA	6,989	2,223	8,318	2,414	8,291	2,616	1.07%	11
SOUTHERN	39,976	70	41,450	76	44,223	77	5.72%	11
STONE_HS	14,181	33	15,181	33	16,364	33	2.12%	11
TWIN BEACH								

7. Click **OK** to accept the filtered values.

A magnifying glass icon  displays in the column you filtered to indicate that there is a value filter applied:

Value Filter

Filter By: Total Titles

Where: Greater Than 45000

apply\_to\_levels: all\_levels

OK Cancel

Item Library	Total Titles	Shadowed Titles	Total Call Numbers	Shadowed Call Numbers	Total Copies	Shadowed Copies	% of Copies to Total Copies	% of Copies Titles
All	316,481	2,786	704,813	3,394	773,579	4,321		244.4
CHAR_HALL	49,909	64	52,560	73	56,107	87	7.25%	112.4
FAIRVIEW	45,306	33	47,349	40	51,009	42	6.59%	112.5
LA_PLATA	62,318	18	64,837	32	68,978	48	8.92%	110.6
LEONARDTN	61,152	29	65,501	43	74,905	614	9.68%	122.4
LEXINGTONPK	74,277	101	77,569	125	92,165	162	11.91%	124.0
POTOMAC	48,941	18	50,640	20	53,021	22	6.85%	108.3
PRINCFRED	76,371	88	80,658	96	89,010	157	11.51%	116.5
WALDORF	84,577	112	88,163	119	95,311	123	12.32%	112.6

8. To remove the filter, use the same steps to display the Value Filters box, set the filter to No Filter, and click **OK**:

The screenshot shows the SirsiDynix 'All Catalog Measures' interface. At the top, there is a menu bar with options: Menu, Save, Save As, Print, E-Mail, Design, Reload, and Info. Below the menu bar, there are several filter fields for 'All Catalog Measures': Title Catalog Format, Language of Title, Place of Publication, Title Created By, Date Title Created, Title Modified By, Date Title Modified, Date Title Cataloged, Year Published, and Call Type. All these fields are currently set to 'All'.

On the left side, there is an 'Item Library' section with a list of items: CHAR\_HALL, FAIRVIEW, LA\_PLATA, LEONARDTN, LEXINGTONPK, POTOMAC, PRINCFRED, and WALDORF. The 'All' item is selected.

In the center, there is a 'Measures' section. A 'Value Filter' dialog box is open, showing a list of filters. The 'Filter By' field is set to 'Total Titles'. The 'Where' field is set to 'No Filter'. The dialog box also has 'OK' and 'Cancel' buttons.


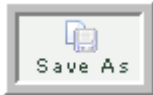





On the right side, there is a table with the following columns: Total Titles, Shadowed Titles, Total Call Numbers, Shadowed Call Numbers, Total Copies, Shadowed Copies, % of Copies to Total Copies, and % of Copies Titles. The table contains data for the selected 'All' item.

Total Titles	Shadowed Titles	Total Call Numbers	Shadowed Call Numbers	Total Copies	Shadowed Copies	% of Copies to Total Copies	% of Copies Titles
4,321							
87						7.25%	112.4
42						6.59%	112.5
48						8.92%	110.6
614						9.68%	122.4
162						11.91%	124.0
22						6.85%	108.3
157						11.51%	116.5
123						12.32%	112.6

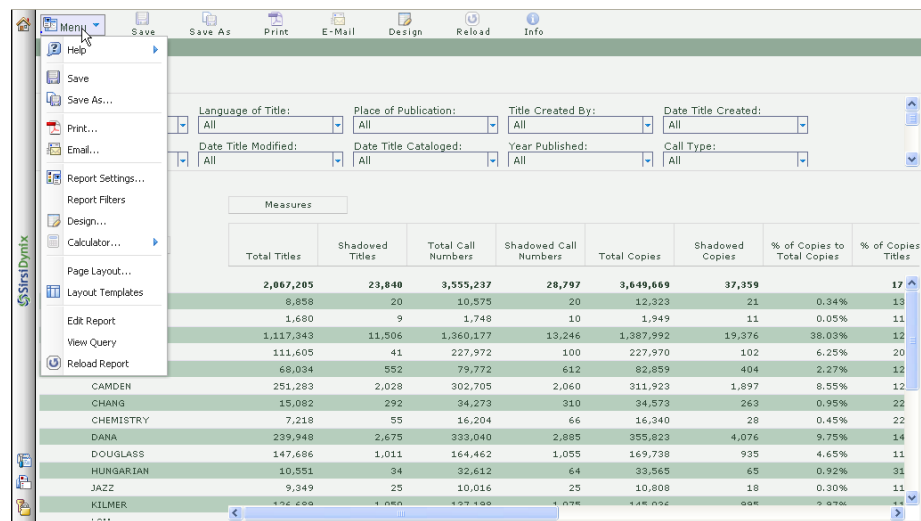
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## Reports Toolbar

When working within a report, a toolbar displays that may be used to manage your customized report:

Icon	Description
	<b>Save</b> – Allows you to save modifications to a report in My Folder and/or your Dashboard. A message displays indicating that the report has been saved and you can continue working.
	<b>Save As</b> – Allows you to save the report to My Folder and/or your Dashboard. You will be prompted to load the new report or to continue working on the existing report.
	<b>Print</b> – Allows you to set attributes such as paper size and layout, or set security on the produced document. Prints the report to a pdf file.
	<b>Email</b> – Allows you to email a report link to another user. The person wishing to view the report must have a Director's Station login. A copy of the report is automatically saved to the My Folder/Emails folder of the user that emailed the report. The user that receives the email can then save the report to his folder.
	<b>Design</b> – Allows you to choose, arrange and apply desired dimensions, filters, calculations, and other options prior to running the query. This allows for reports to be created and manipulated in a “batch mode” without running queries after each user action, cutting down the time to create a report and the load on the server. The Design mode is the default page displayed when accessing new cubes or can be accessed by clicking the “Design” icon from any existing report.
	<b>Reload</b> – Allows you to return to the last <u>s</u> aved version of the report, including the page layout and report settings.
	<b>Info</b> – Allows you to display information about the report including the date refreshed, which is the last time the cube was processed.

These same icons, along with the options shown below, can be accessed through the Menu at the top-left corner of the report:



## Icon Description



**Report Settings** – Contains two tabs. The General tab allows you to display or hide empty data. It also allows you to determine how subtotals will be displayed. The Layout tab allows you to display or hide elements of the window such as the panel menu and borders, the toolbar, or the organization bar.

**Report Filters** – Allows you to display and manage any of the report filters you have in play, either in the member lists (dimensions and measures), or in the values (cell data).



**Calculator** – Allows you to add MDX queries to create calculations or calculated members.

**Page Layout** – Allows you to manage the display of the dimension pool, the chart pane, or the report grid.



**Layout Templates** – Allows you to select a different panel layout for the report. Nine options are available. F indicates the Filter (dimension) pool location. G indicates the report Grid location. C indicates the graphic Chart location.

**Edit Report** – Allows you to view and edit the report XML.

**View Query** – Allows you to display the MDX query that is being sent to Analysis Services.

---

## Saving Reports

### *To save a report*

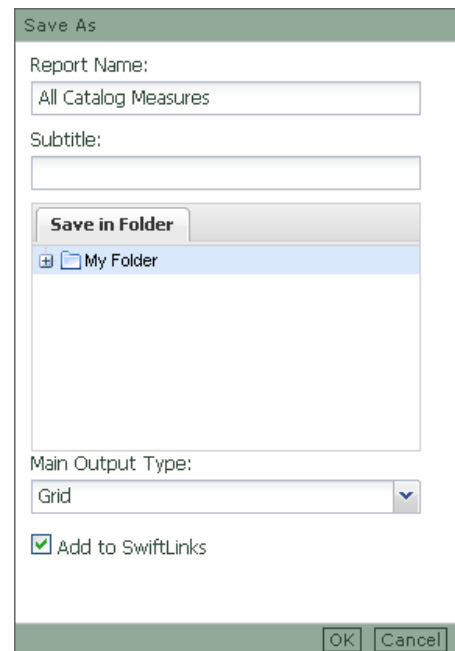
Typically you create a new report by starting with one of the All ... Measures reports, or a report derived from one of these reports. If a report is created by browsing a cube, it will not have any of the options for producing detailed list reports. You can click Edit Report and modify the XML to permit reports created by browsing the cube to allow the detailed lists.

---

1. Once you have accessed a report and modified it to

create a new report, click  on the toolbar or **Save As** in the menu.

The **Save As** dialog appears. If you are not an administrator, the Save As dialog looks like this:



The image shows a 'Save As' dialog box with a green title bar. It contains the following fields and controls:

- Report Name:** A text box containing 'All Catalog Measures'.
- Subtitle:** An empty text box.
- Save in Folder:** A button with a folder icon and the text 'Save in Folder'.
- Folder Selection:** A list box showing 'My Folder' as the selected item.
- Main Output Type:** A dropdown menu with 'Grid' selected.
- Add to SwiftLinks:** A checkbox that is checked.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

2. Enter a new **Report Name**.
3. Enter an optional **Subtitle** if you want to have more information.
4. Accept **My Folder** or a subfolder in My Folder as the default selection for **Save In Folder**.
5. Select a **Main Output Type**.

This allows you to control the icon that displays alongside the report name in the SwiftView and Menus. The options are **Chart** or **Grid**. Some reports have only one option for selection. If both the chart and the grid are selected in the Page Layout, you can select either as the main output type.

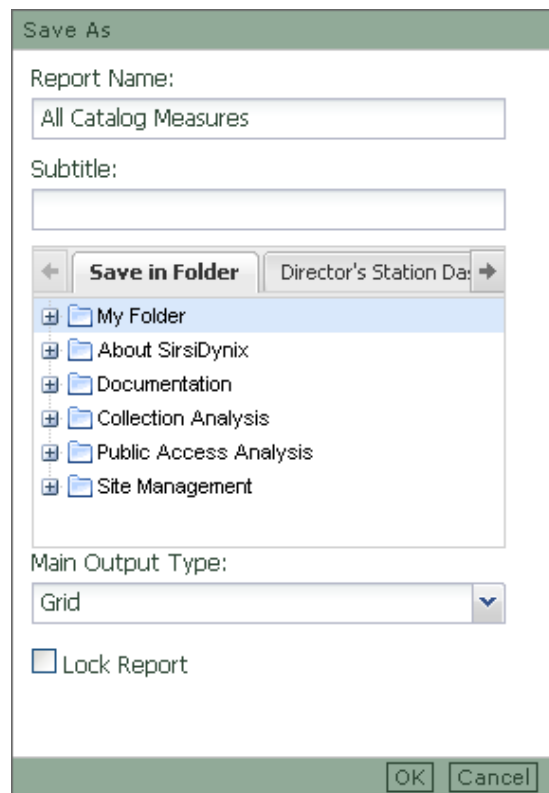
6. If you want the new report to appear on your Dashboard under SwiftAnalysis, choose **Yes** for **Add to SwiftLinks**.
7. Click **OK** to save the report.

### ***To save a report as an administrator***

1. Once you have accessed a report and modified it to

create a new report, click  on the toolbar or **Save As** in the menu.

The **Save As** dialog appears. If you are an administrator, the Save As dialog looks like this.



2. Enter a new **Report Name**.
3. Enter an optional **Subtitle** if you want to have more information.

- 
4. Accept **My Folder** or a subfolder in My Folder as the default selection for **Save In Folder** or navigate to one of the **Public** folders or subfolders.
  5. Change tabs to **Director's Station Dashboard**.
  6. Select My SwiftView to save to the Administrator's personal Dashboard.

All of the groups that the administrator belongs to are displayed. By selecting the group names, the administrator can save the current report to all of the selected Dashboards:

Save As

Report Name:  
All Catalog Measures

Subtitle:

← der **Director's Station Dashboard** →

- ☒ My SwiftView
- ☐ Administrators
- ☐ Directors
- ☐ Template

Main Output Type:  
Grid

☐ Lock Report

OK Cancel

---

This does not save the report to the individual users' My Director's Station Dashboard.

---

The **Main Output Type** allows you to control the icon that displays alongside the report name in the SwiftView and Menus. The options are **Chart** or **Grid**. If the Page Layout contains only one, it is the only option for selection. If both the chart and the grid are selected in the Page Layout, you can select one or other as the main output type.

7. Select the **Main Output Type** you desire for this report.
8. If you wish, select **Lock Report** to prevent other users from making changes to this report.

---


The user to "last modify" a report may overwrite the report regardless of the report's lock status.

---

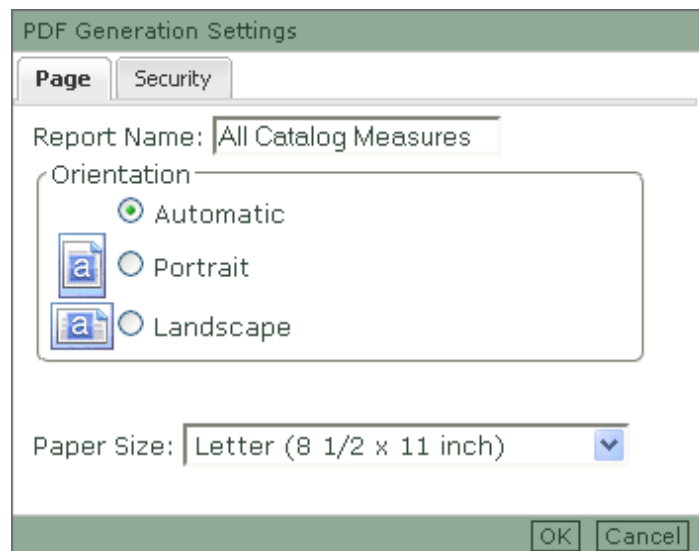
9. Click **OK** to save the report.

## Printing Reports

### *To print a report*

1. View or create a report, and click  on the toolbar or in the Menu.

The Page tab displays by default:



2. Enter the name that you want to be associated with the printed report in the **Report Name** field.

This does not change the name of the report in the Director's Station.

3. Accept **Automatic** in the **Orientation** box.

Automatic will select the best format for the data. You can override this by selecting a specific page orientation option.

4. Accept the default **Paper Size** or select one of many paper size options.
5. Select the **Security** tab to display security options:

PDF Generation Settings

Page Security

☐ Encrypt Document

Password:

☒ Allow Printing ☒ Allow Text Copy

☒ Allow Screen Readers

OK Cancel

6. Select the security options you prefer.

If **Encrypt Document** is checked, a password is required to view the report or any saved PDF created from the report. Checking additional security options allows you to prevent a document created from the report from being printed, copied and pasted, or screen printed.

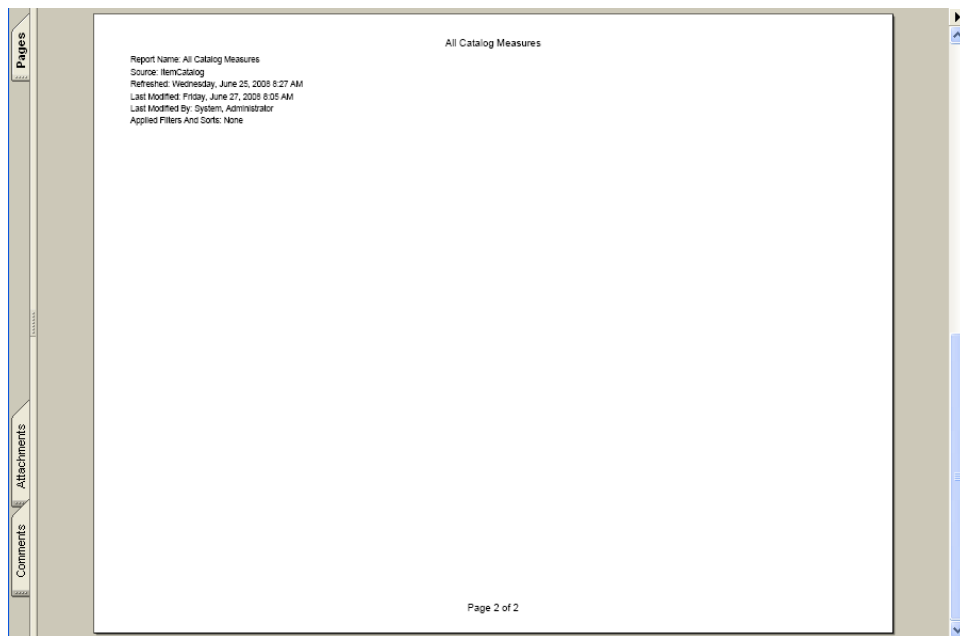
7. Click **OK** to print the report to PDF:

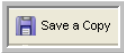
All Catalog Measures

Item Library	Total Titles	Shadowed Titles	Total Call Numbers	Shadowed Call Numbers	Total Copies	Shadowed Copies
ALEXANDER	1,117,343	11,506	1,360,177	13,246	1,387,992	19,376
ART	66,034	652	79,772	612	82,859	404
CAMDEN	251,283	2,028	302,705	2,060	311,823	1,897
CHEMISTRY	7,218	55	16,204	66	16,340	28
HUNGARIAN	10,551	34	32,612	64	33,565	65
JAZZ	9,349	25	10,016	25	10,808	18
MATH	33,084	185	56,493	300	57,177	191
MEDIA	9,698	243	11,826	293	11,786	148
MUSIC	80,627	1,499	99,238	1,860	105,863	601
PHYSICS	11,214	79	28,091	86	28,740	41

Page 1 of 2

The last page of the PDF report provides information about the source of the report:




8. If you wish to keep a static PDF version of the report for future reference, Click .
9. Open the PDF document and use the **File / Print** option there to print the report.

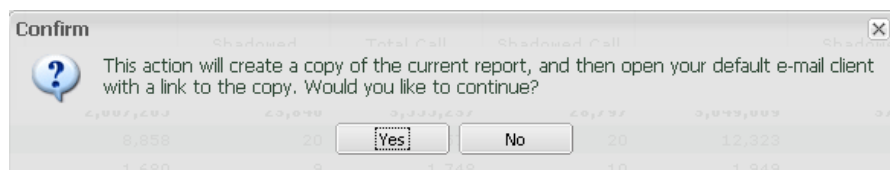
## E-mailing Reports

Your administrator must configure the Email options in Manage Settings for emailing to work.

### To e-mail a report

1. View or create a report, then click  on the toolbar or **Email** in the Menu.

Director's Station displays the following message:



Clicking **Yes** here puts a copy of the report you are emailing into your **My Folder / Emails** folder, and opens email so you can send the report link. Clicking **No** cancels the email process without saving a copy of the report or sending a link to the report.

2. Click **Yes** to email the report.

Your email application opens and displays a link to the report.

3. If desired, add any additional text to the email.
4. Add the email address(es) of the recipient(s).
5. Send the email.

---

Any user accessing this report through the e-mailed link must have a valid Director's Station login and password. If the recipient clicks **Save**, he will be prompted to save the report into his own My Folder.

---

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If a user does not have access to Director's Station, you can still save the report to PDF and email it as an attachment.

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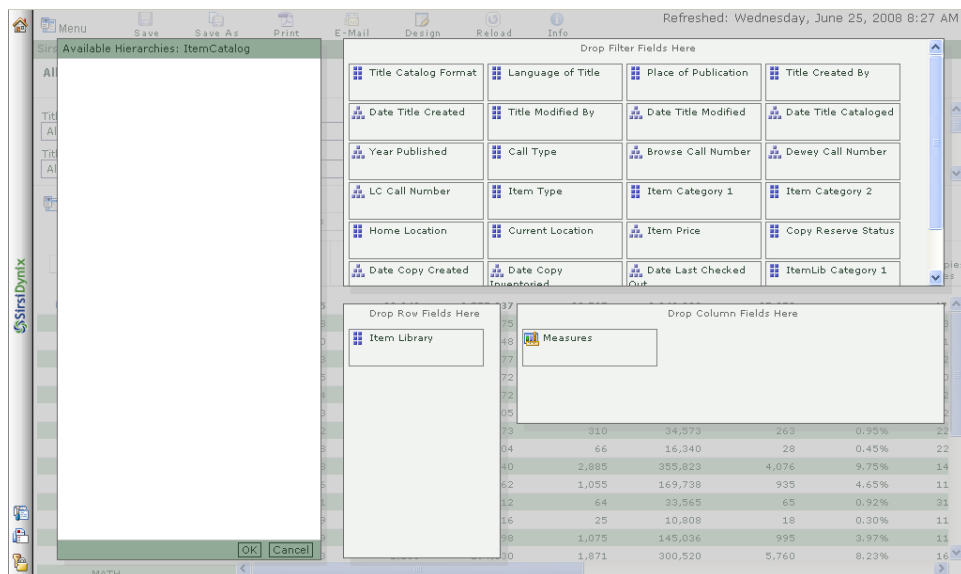
## Design

Use Design to control the display of individual reports.

### *To use the designer*

1. View or create a report, then click  on the toolbar or **Design** in the Menu.

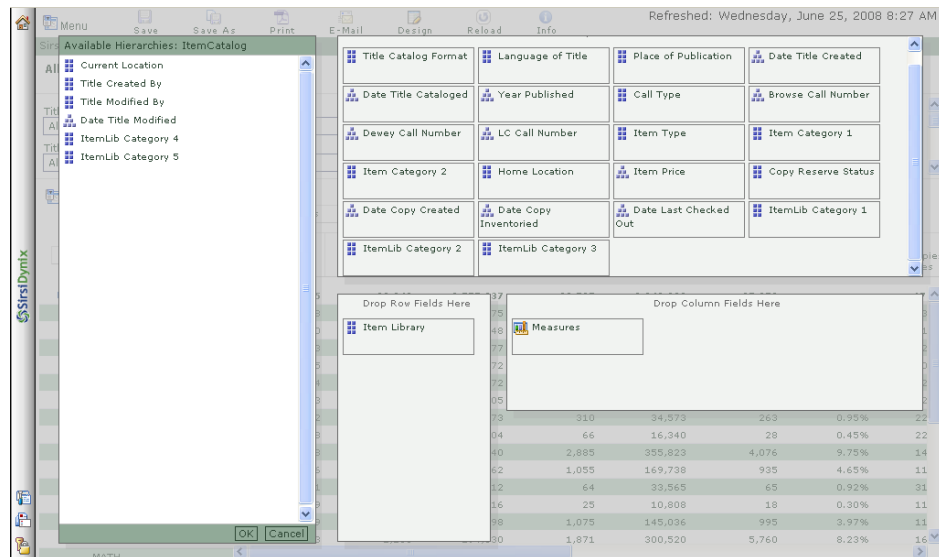
The **Design** dialog appears:



In the delivered All ... Measures reports, all of the **Available Hierarchies** are displayed in the **Drop Filter Fields Here** box at

the top, because all of the available dimensions are displayed in the default reports.

2. Drag any of the filters that you do not want to display on your designed report back into the **Available Hierarchies** box in the left-most column:



In the **Drop Filter Fields Here** box, you can click on any of the dimensions to see the available members. You cannot limit members here.

3. Drag and drop dimensions and measures to the **Drop Row Fields Here** or **Drop Column Fields Here** boxes where you want them to appear in your report.
4. If needed, filter members of report dimensions in either the **Drop Row Fields Here** or **Drop Column Fields Here** boxes by clicking on the dimensions.
5. When all desired dimensions, measures, and filters are in place, click **OK** at the bottom of the Available Hierarchies.
6. Review your new report and make any further changes that may be needed.
7. Once perfected, print, email and/or save your report for future use, as needed.

---

It is faster to use the Design option when creating complicated reports, because the query is not sent to the server until you have completed your selections.

---

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## Calculator

Use the Calculator to achieve more detailed results based on calculations on individual fields.

Keep the following information in mind when you are deciding to use the calculator:

- The values created by the calculator do not appear in any report other than the one in which they were created.
- It is possible to copy and paste values into the text box between reports.
- The code that is created is MDX and any valid MDX can be used in the text box.

In previous versions, the practice of grouping dimensions together using the calculator was popular.

### **Example:**

The following item types would be added together for a single JUVENILE group:

JUV-BOOK

JUV-AV

JUV-MAG

JUV-CD

JUV-KIT

This practice is virtually obsolete in this new version for the following reasons:

- If you have the dimension on the row, it is possible to subtotal selected members so that you can obtain a total for a specific grouping.
- If you have the dimension in the filter pool, it is possible to select multiple members so you can obtain a limit on a specific grouping.

These additional factors should discourage this practice:

- You cannot obtain title list for any calculated dimension member.
- Performance is degraded when calculated members are used.

### ***To use the calculator***

1. View or create a report, then from the **Menu** click



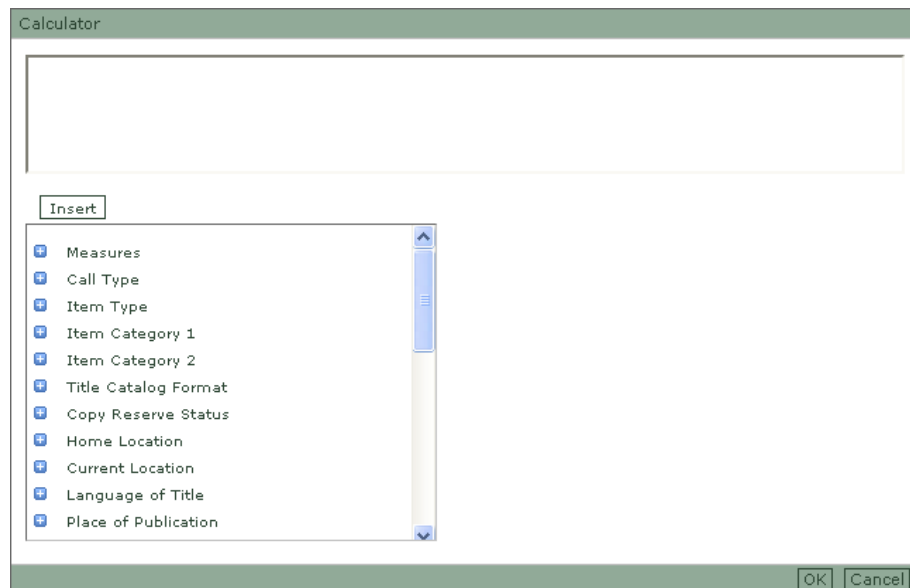
**Calculator.**

2. Select **New** to display the Calculator dialog:

---

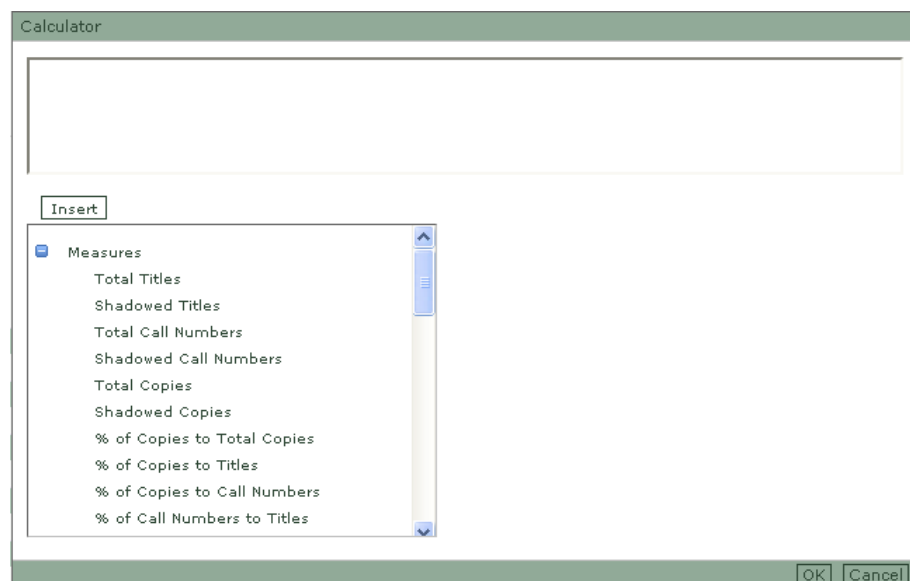
After the initial calculation is created, you also have the option to Edit or Delete existing calculations.

---

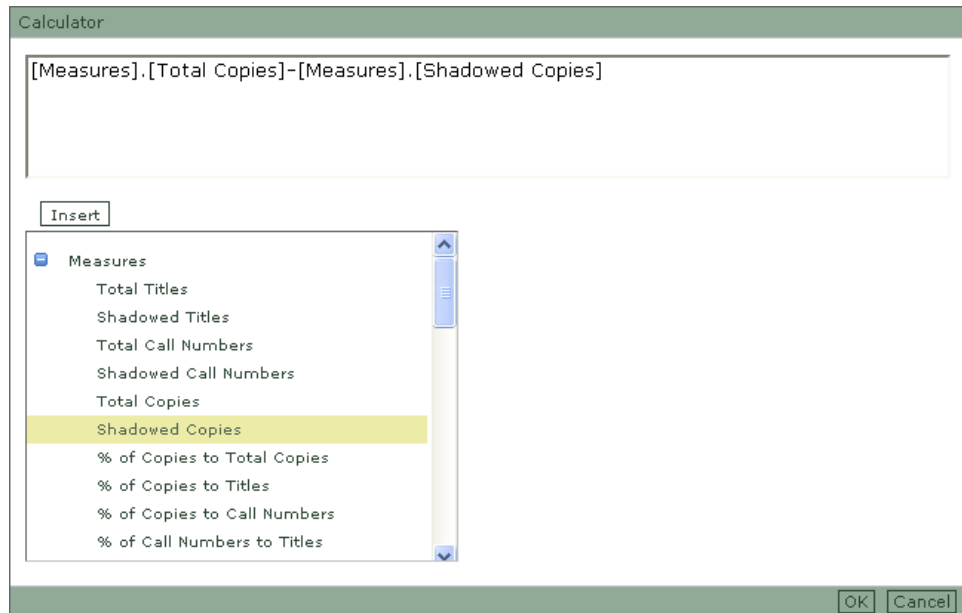


3. Select Measures or the dimension your calculation relates to.

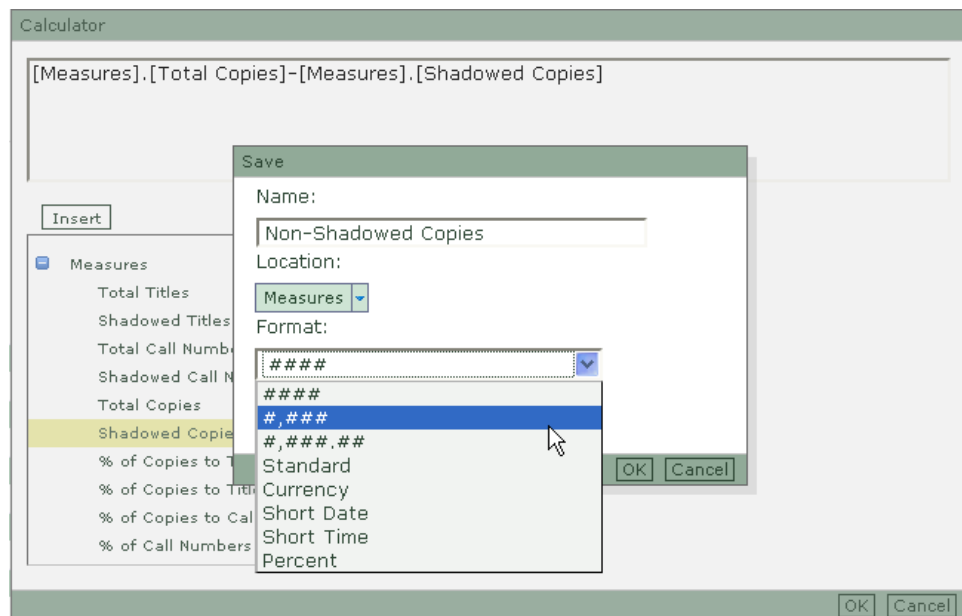
Available members display:



- Click on the first desired member to add it to the calculation box.
- Type basic calculation symbols (+, -, \*, /) and add other measure or dimension members (you can also use parenthesis to force the correct order of operations) to develop a new calculation measure:



- When the calculation is fully defined, click **OK** to display the **Save** box:



7. Enter a **Name** for the calculation as you would like it to display in the report.
8. Select the **Location** group where the calculation will be stored.

The location group will almost always be the same dimension that the members used in the calculation came from.

9. Select the **Format** of the numeric display.
8. Click **Save**.


The new measure or dimension appears in the report:

Item Library	Total Copies	Shadowed Copies	Non-Shadowed Copies
All	3,649,669	37,359	3,612,310
ALCOHOL	12,323	21	12,302
ALCOHOL/NJ	1,949	11	1,938
ALEXANDER	1,387,992	19,376	1,368,616
ANNEX	227,970	102	227,868
ART	82,859	404	82,455
CAMDEN	311,923	1,897	310,026
CHANG	34,573	263	34,310
CHEMISTRY	16,340	28	16,312
DANA	355,823	4,076	351,747
DOUGLASS	169,738	935	168,803
HUNGARIAN	33,565	65	33,500
JAZZ	10,808	18	10,790
KILMER	145,036	995	144,041
LSM	300,520	5,760	294,760
MATH	57,177	191	56,986

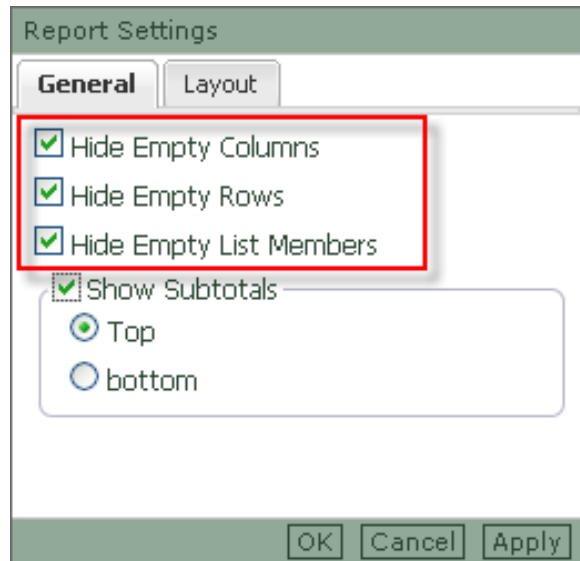
## Report Settings

Use the Report Settings to determine how a particular report will behave or display. The General tab contains the behavior values. The Layout tab contains options for hiding or displaying several aspects of reports.

### Using Report Settings to Hide Empty Data

1. View or create a report, and click  **Report Settings** from the Menu.

The General tab displays:



The first three options are related to hiding empty data. These are delivered turned on. You can hide entire columns or rows that have no data in any of the cells. You can also hide members in filters that, if selected, would result in no data based on the current grid and other filters that have been set.

**Example:**

If you filtered on BOOK as an item type, the AV home location filter member would not display because there are no BOOK types in AV.


---

Hiding empty data options may increase the time it takes to execute the query. Hide Empty Member Lists in particular should be turned off if performance becomes an issue when opening filter boxes.

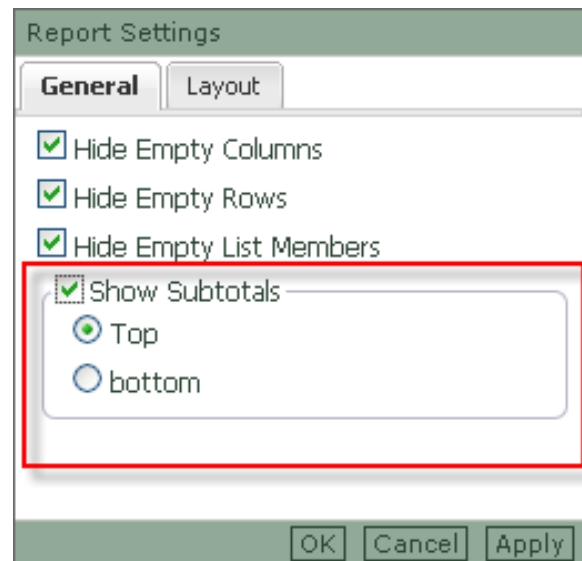
---

2. Select the options you want.
3. Click **OK** to save changes.

***Using Report Settings to Show Subtotals***

1. View or create a report, and click  **Report Settings** from the Menu.

The General tab displays. The last option is related to showing subtotals:



2. Click the **Show Subtotals** to display the Top and Bottom options.
3. Select **Top** or **Bottom** to place subtotals either at the top of the member list (under the All, if it is displayed) or at the bottom.

When Show Subtotals is enabled, and you have any filters applied to the dimensions on the rows, the remaining members' values are subtotaled:

SirsiDynix

Menu Save Save As Print E-Mail Design Reload Info

All Catalog Measures

Title Catalog Format: All Language of Title: All Place of Publication: All Title Created By: All Date Title Created: All

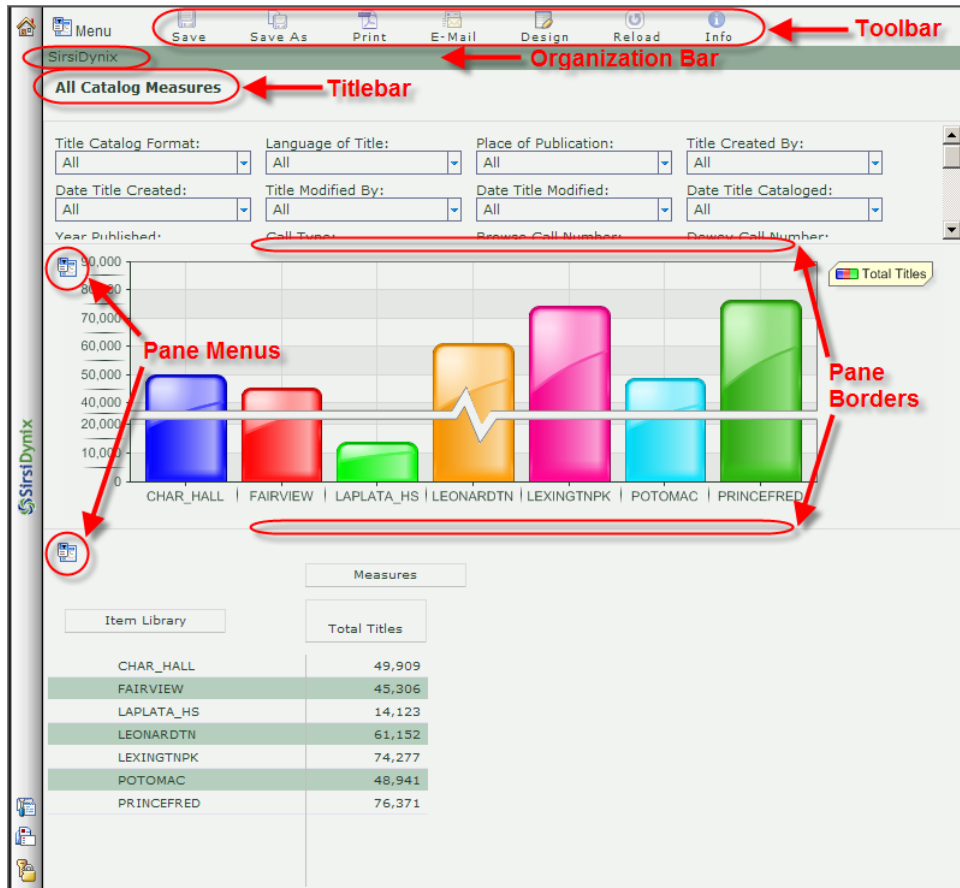
Title Modified By: All Date Title Modified: All Date Title Cataloged: All Year Published: All Call Type: All

Measures			
Item Library	Total Titles	Total Call Numbers	Total Copies
All	2,067,205	3,555,237	3,649,669
subtotal	216,748	300,389	313,910
ALCOHOL	8,858	10,575	12,323
ART	68,034	79,772	82,859
CHEMISTRY	7,218	16,204	16,340
JAZZ	9,349	10,016	10,808
MATH	33,084	56,493	57,177
MUSIC	80,627	99,238	105,663
PHYSICS	11,214	28,091	28,740


If you have partial security set on any of the available dimensions, the subtotal can be used too.

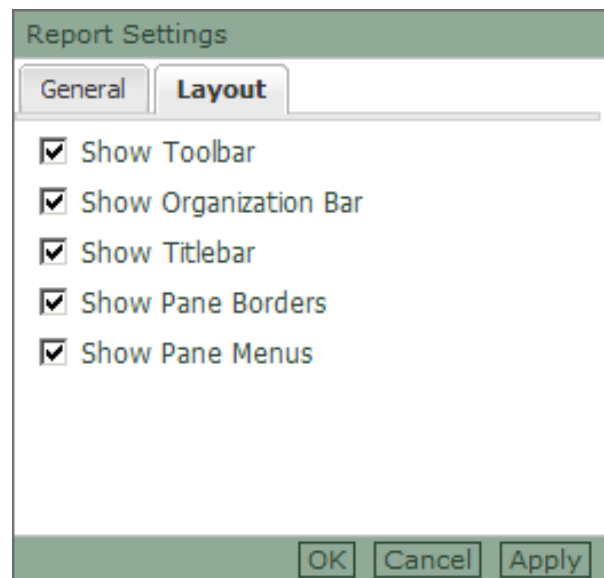
## Using Report Settings to manage other aspects of reports

Using the Layout tab on Report Settings, you can control whether or not to display the toolbar, organization bar, titlebar, pane borders, or pane menus. Each of these aspects can be seen in this sample report:



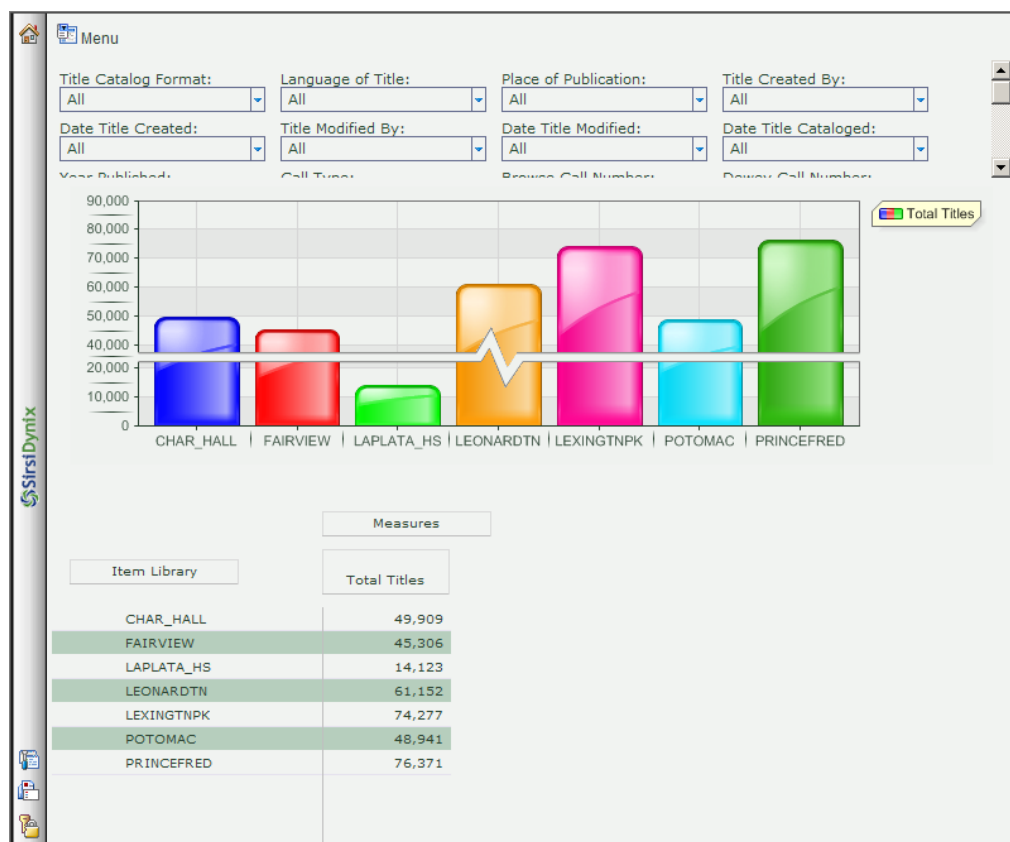
To hide or display any of these aspects:

1. View or create a report, then click  **Report Settings** on the Menu.
2. Select the **Layout** tab:



3. Check whichever aspects you wish to display and uncheck any you wish to mask.
4. Click **OK**.

When all aspects are masked, the report shown on the previous page looks like this:



## Grid Menu

On each report there is another menu that is available within the grid panel that provides additional options.

These options are available in both the initial grid reports, and the drill-down list reports.

### Icon Description




**Export ...** – Allows you to export the contents of the report to a comma separated file, or Excel.



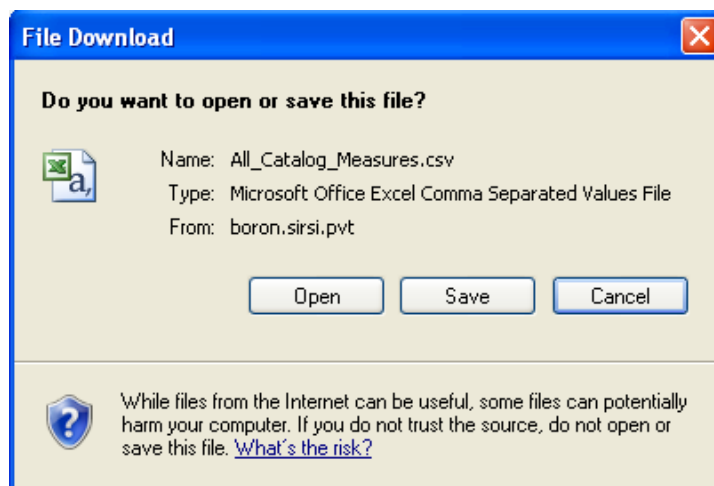
**Grid Settings** – Allows you to change the display, behavior, and format of the grid.

	Total Titles	Shadowed Titles	Total Call Numbers	Shadowed Call Numbers	Total Copies	Shadowed Copies	% of Copies to Total Copies	% of Copies to Titles
All	2,029,944	24,278	3,483,633	28,980	3,583,350	37,453		1%
ALCOHOL	8,134	25	9,842	26	12,282	27	0.34%	1
ALCOHOL/IN	1,676	9	1,744	10	1,946	11	0.05%	1
ALEXANDER	1,102,387	11,841	1,339,197	13,587	1,369,473	19,692	38.22%	1
ANNEX	109,427	29	214,346	85	214,408	86	5.98%	1
ART	66,530	446	78,058	509	81,192	301	2.27%	1
CAMDEN	249,599	1,706	301,269	1,739	311,173	1,570	8.68%	1
CHANG	14,393	319	33,745	337	34,160	287	0.95%	2
CHEMISTRY	7,113	57	16,120	68	16,261	30	0.45%	2
DANA	238,342	2,974	328,084	3,186	351,191	4,363	9.80%	1
DOUGLASS	146,914	1,088	163,667	1,137	168,982	984	4.72%	1
HUNGARIAN	10,131	34	31,312	64	32,270	67	0.90%	2
JAZZ	9,287	25	9,949	25	10,741	18	0.30%	1
KILMER	126,557	1,173	137,094	1,198	145,062	1,118	4.05%	1
LSM								

### To export a report

1. View or create a report, then click  **Export** in the grid menu just above the report columns (NOT the main menu).

A window asking whether you want to open or save the file may appear. The report will be exported as a .csv file into the default spreadsheet application on your workstation:



2. **Open** and/or **Save** this file as you would other imported or exported files:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	
1	All Catalog	Measures														
2	ItemCatalog															
3		Measures														
4	Item Library	Total Titles	Shadowed	Total Call	Shadowed	Total Copies	Shadowed	% of Copies	% of Copies	% of Copies	% of Call	% of Titles	Total Copies	Total Checked	Total Titles	
5	All	2029944	24278	3483633	28980	3583350	37453	1.765246	1.028624	1.716123			24232490	7845638		
6		ALCOHOL	8134	25	9842	26	12282	27	0.003428	1.509958	1.247917	1.209983	15464.23	20087	1	
7		ALCOHOL	1676	9	1744	10	1946	11	0.000543	1.161098	1.115626	1.040573	3190.29	4174	2	
8		ALEXAND	1102387	11841	1339197	13587	1369473	19692	0.382177	1.24228	1.022608	1.214816	543063	9645807	3660124	2
9		ANNEX	109427	29	214346	85	214408	86	0.059835	1.95937	1.000289	1.958804	0.053906	249705.3	93588	0
10		ART	66530	446	78058	509	81192	301	0.022658	1.220382	1.04015	1.173275	0.032774	885173.9	50694	0
11		CAMDEN	249599	1706	301269	1739	311173	1570	0.086839	1.246692	1.032874	1.207012	0.122959	2517582	775294	2
12		CHANG	14393	319	33745	337	34160	287	0.009533	2.373376	1.012298	2.344542	0.00709	417751.6	93485	2
13		CHEMIST	7113	57	16120	68	16261	30	0.004538	2.286096	1.008747	2.266273	0.003504	344867.3	57805	3
14		DANA	238342	2974	328084	3186	351191	4363	0.098006	1.473475	1.07043	1.376526	0.117413	3029585	730688	
15		DOUGLAS	146914	1088	163667	1137	168962	984	0.047158	1.15021	1.032474	1.114033	0.072373	962996.5	606281	3
16		HUNGARI	10131	34	31312	64	32270	67	0.009006	3.185273	1.030595	3.090712	0.004991	1541.05	879	0
17		JAZZ	9287	25	9949	25	10741	18	0.002997	1.158563	1.079606	1.071282	0.004575	56127.96	132	0
18		KILMER	126557	1173	137094	1198	145062	1118	0.040482	1.146219	1.058121	1.083259	0.062345	823181.6	385344	2
19		LSM	183389	1295	290984	1854	297260	5748	0.082956	1.620926	1.021568	1.586704	0.090342	2586201	753384	2
20		MATH	32692	217	56726	338	57417	232	0.016023	1.756301	1.012181	1.735165	0.016105	354116.5	230449	4
21		MEDIA	9461	211	11561	261	11539	128	0.00322	1.219639	0.998097	1.221964	0.004661	421550.4	43121	3
22		MUSIC	79982	1540	98403	1904	105107	647	0.029332	1.314133	1.068128	1.230314	0.039401	1060162	246460	2
23		PHYSICS	11148	84	26251	91	28906	46	0.008067	2.592931	1.023185	2.534177	0.005492	212431.1	78715	2
24		RU-ONLIN	236172	148	236177	151	235897	162	0.065831	0.998836	0.998814	1.000021	0.116344	33225.15	7	2
25		SERC	93	90	93	90	98	96	2.73E-05	1.053763	1.053763	1	4.58E-05	0	430	4
26		SMIR	5287	15	6739	26	7081	16	0.001976	1.339323	1.050749	1.274636	0.002605	28522.02	10045	1
27		SPCOLUA	77624	979	88292	1220	89011	799	0.02484	1.146694	1.008143	1.137432	0.038239	582940.1	2122	0
28		TSB	1592	263	1593	1074	1356	1025	0.000378	0.851759	0.851224	1.000628	0.000784	330.61	330	0
29		UNDEFINE	1		1		1	0	2.79E-07	1	1	1	4.93E-07	0	0	
30		WHITMAN	347		386		536	0	0.00015	1.544669	1.388601	1.112392	0.000171	37.95	0	
31																
32																

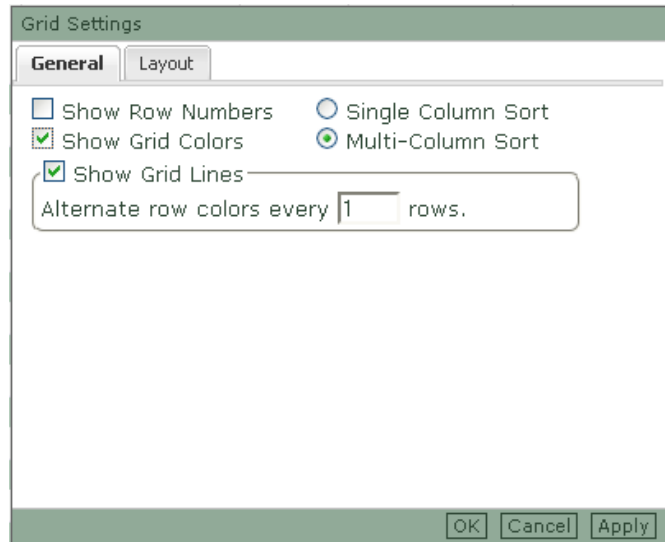
## Grid Menu Settings

1. View or create a report, then from the grid **Menu**, click



**Grid Settings.**

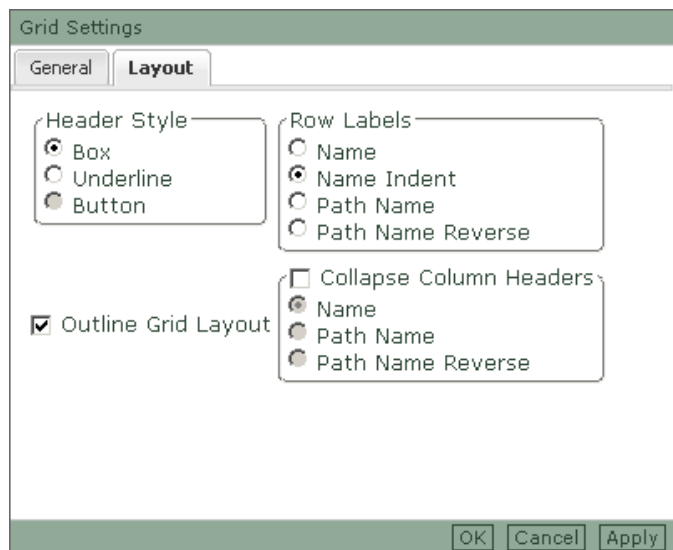
On the General tab, you have options for display, as well as the option to set the report to Multi-Column Sort:



It is necessary to select both a display option and Multi-Column Sort for the setting to change. Additionally the columns have to be defined as `sortingenabled="true"` in the report XML or the sorting does not work.

2. Select one display option and Multi-column Sort.
3. Click on the **Layout** tab.

On the **Layout** tab, you have additional options for display:



4. Select whichever options you desire.
5. Click **OK** or **Apply** to save your changes, or **Cancel** to close without saving your changes.

# Charts

Charts give the user the ability to visually analyze the data contained in reports.

Keep the following information in mind when you are creating charts:

- A chart is automatically associated with every grid report that is created. It can be displayed using the Page Layout option.
- Charts that are created by designing the report and then enabling the default chart are more efficient and portable than those created by highlighting cells, which was used extensively in previous versions.
- If you create a chart by selecting cells, you do not have as much flexibility when working with the report.

## Creating Charts

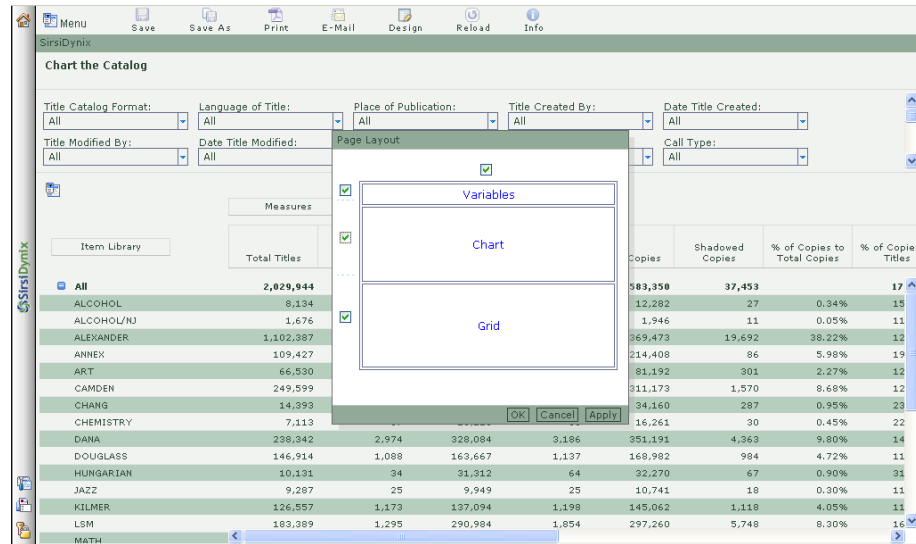
### To create a chart

1. View or create a report in Director's Station:

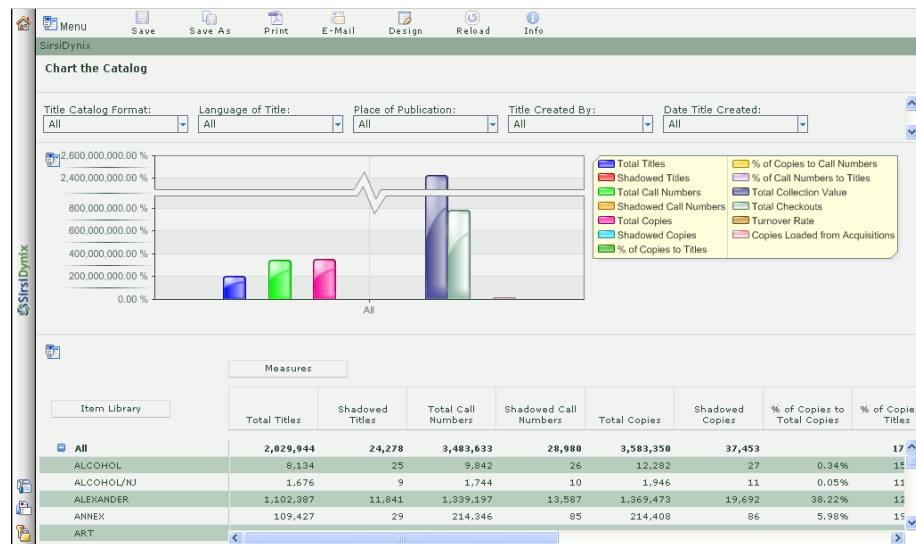
The screenshot shows the SirsiDynix Director's Station interface. At the top is a menu bar with options: Menu, Save, Save As, Print, E-Mail, Design, Reload, and Info. Below the menu bar is a title bar that says 'SirsiDynix'. The main window is titled 'Chart the Catalog'. It contains several filter fields: Title Catalog Format (All), Language of Title (All), Place of Publication (All), Title Created By (All), Date Title Created (All), Title Modified By (All), Date Title Modified (All), Date Title Cataloged (All), Year Published (All), and Call Type (All). Below these filters is a table with the following columns: Item Library, Measures, Total Titles, Shadowed Titles, Total Call Numbers, Shadowed Call Numbers, Total Copies, Shadowed Copies, % of Copies to Total Copies, and % of Copies Titles. The table lists various categories and their corresponding values.

Item Library	Measures	Total Titles	Shadowed Titles	Total Call Numbers	Shadowed Call Numbers	Total Copies	Shadowed Copies	% of Copies to Total Copies	% of Copies Titles
All		2,029,944	24,278	3,483,633	28,980	3,583,350	37,453		17
ALCOHOL		8,134	25	9,842	26	12,282	27	0.34%	15
ALCOHOL/NJ		1,676	9	1,744	10	1,946	11	0.05%	11
ALEXANDER		1,102,387	11,841	1,339,197	13,587	1,369,473	19,692	38.22%	12
ANNEX		109,427	29	214,346	85	214,408	86	5.98%	19
ART		66,530	446	78,058	509	81,192	301	2.27%	12
CAMDEN		249,599	1,706	301,269	1,739	311,173	1,570	8.68%	12
CHANG		14,393	319	33,745	337	34,160	287	0.95%	23
CHEMISTRY		7,113	57	16,120	68	16,261	30	0.45%	22
DANA		238,342	2,974	328,084	3,186	351,191	4,363	9.80%	14
DOUGLASS		146,914	1,088	163,667	1,137	168,982	984	4.72%	11
HUNGARIAN		10,131	34	31,312	64	32,270	67	0.90%	31
JAZZ		9,287	25	9,949	25	10,741	18	0.30%	11
KILMER		126,557	1,173	137,094	1,198	145,062	1,118	4.05%	11
LSM		183,389	1,295	290,984	1,854	297,260	5,748	8.30%	16
MATH									

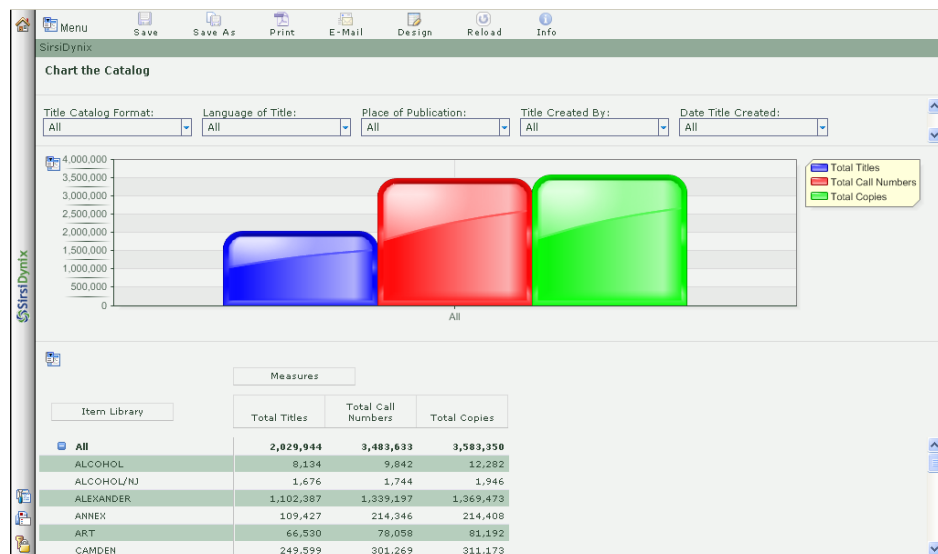
2. In the **Menu**, select the **Page Layout** option.
3. Check the **Chart** checkbox to enable the chart pane:



4. The chart displays along with the report and the grid:

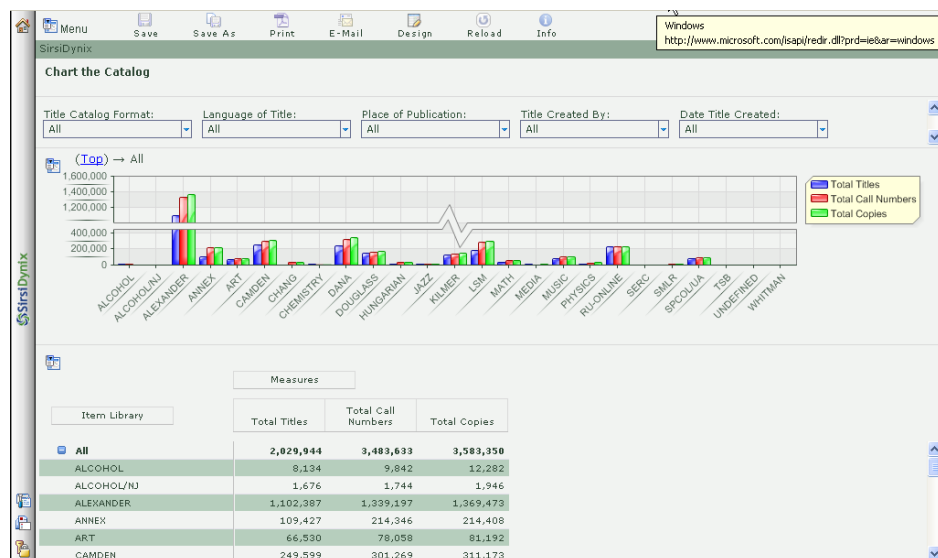


- Within the grid, select only those measures that you want to include in your chart:

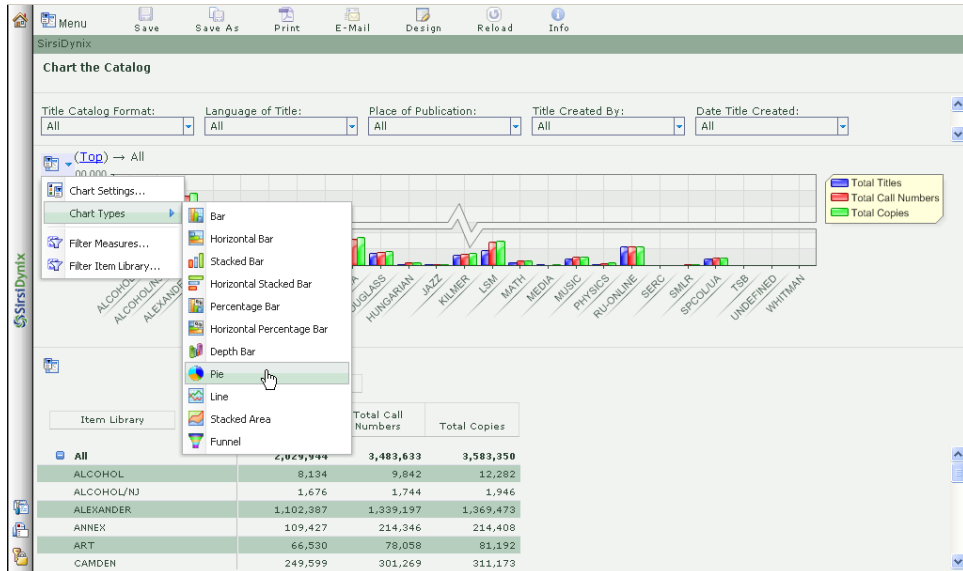


By default, only the All row is displayed in the chart.

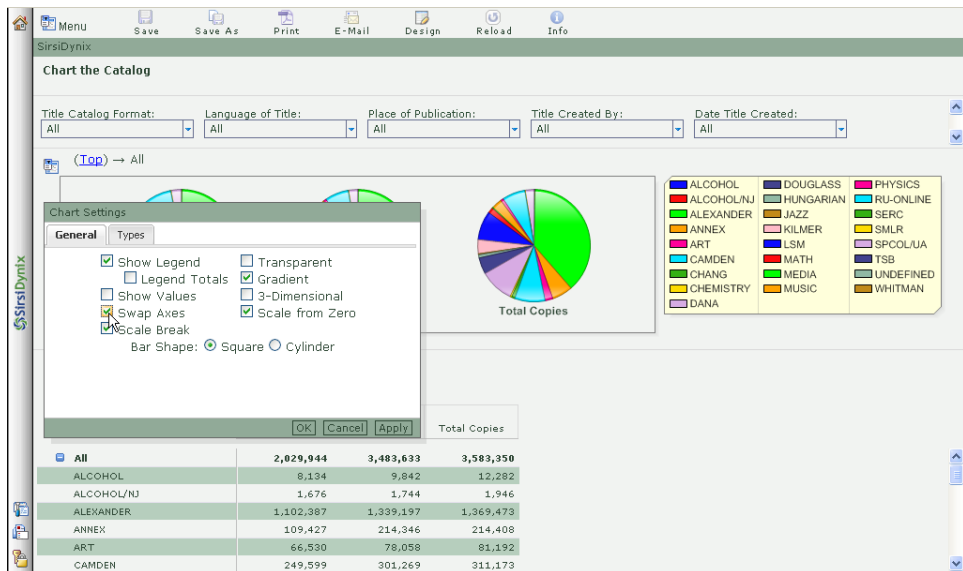
- Click the Chart to display the members under All:



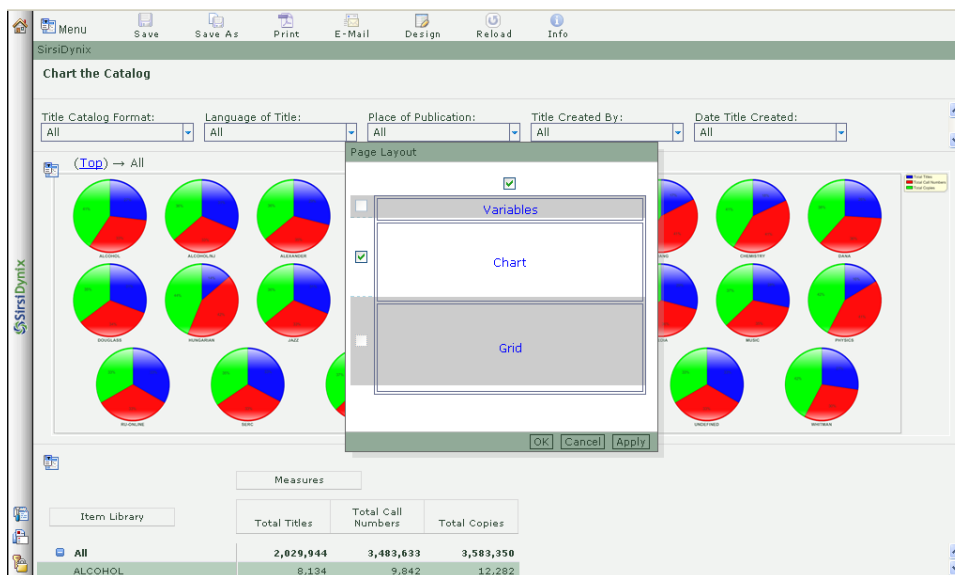
- Hover over the Menu in the Chart pane to see the options that are available to modify the chart.
- Select **Chart Types** to display the types of charts:



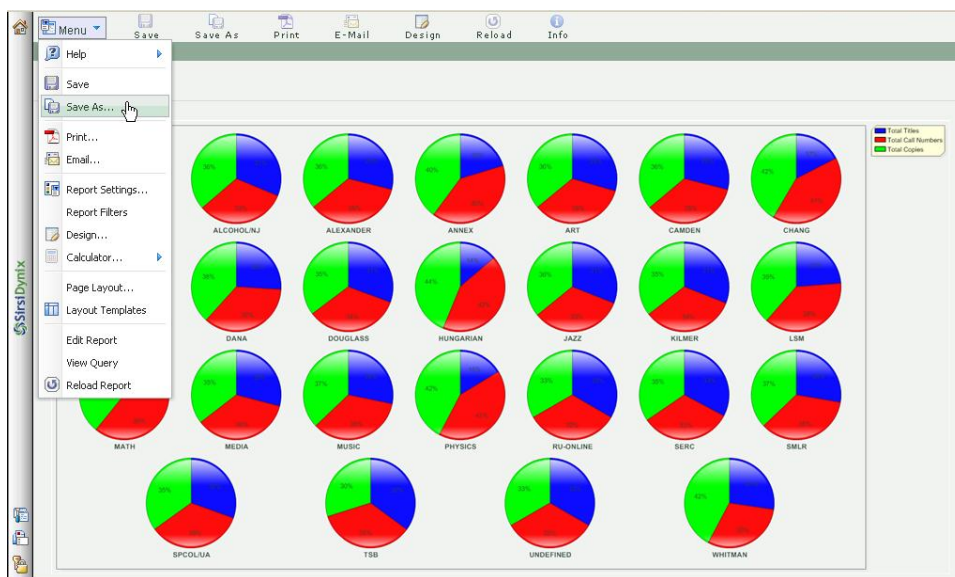
9. Use the **Chart Settings** to swap the axes and show or hide values:



10. Go back to **Page Layout** and hide or reveal the Variables (dimensions/filters) and the Grid:



The chart displays in full screen.

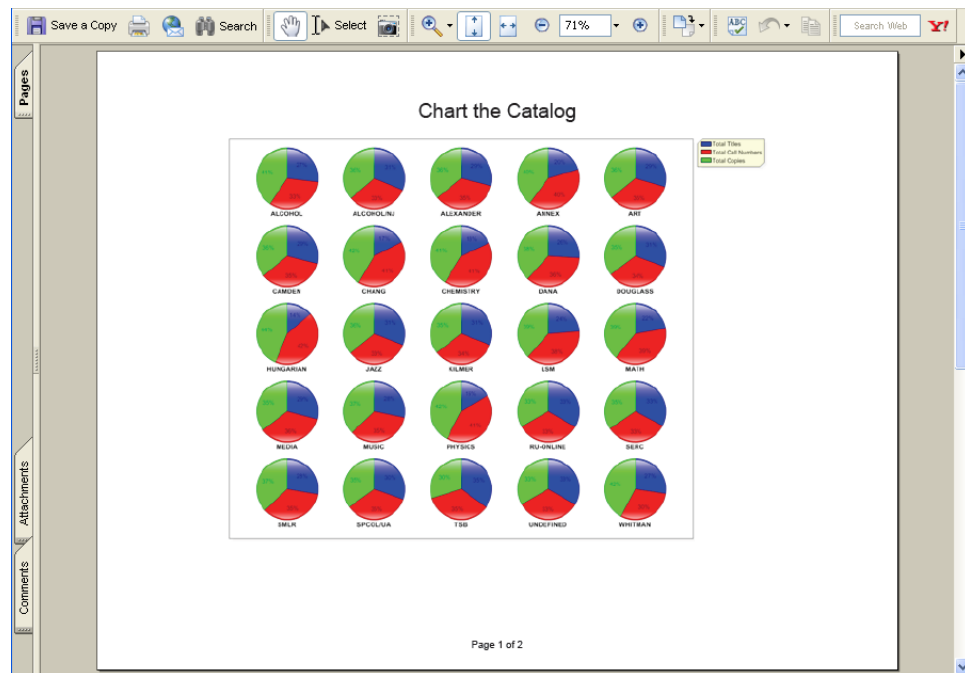


11. Click **Save As** to save the chart.

### To print a chart to PDF

1. In the displayed report, select **Print** from the toolbar or the Menu.
2. Accept the defaults.

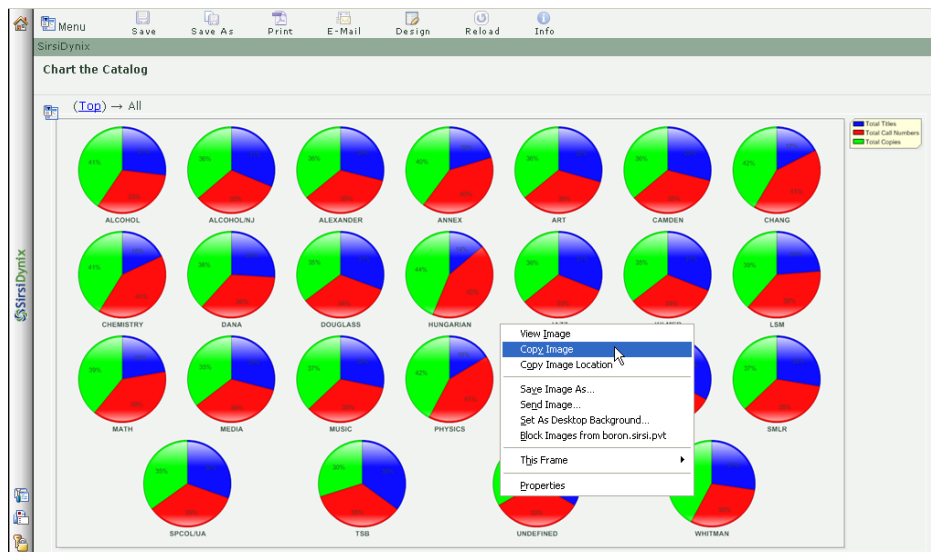
The PDF displays:



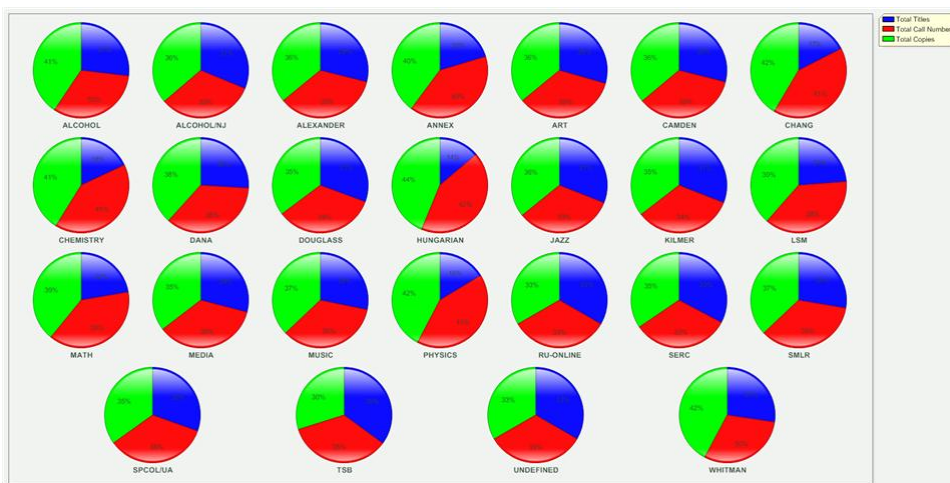
If the grid is displayed in the report, the grid will also be printed to PDF.

### To use the chart in another application

1. In the displayed report, right-click on the chart:

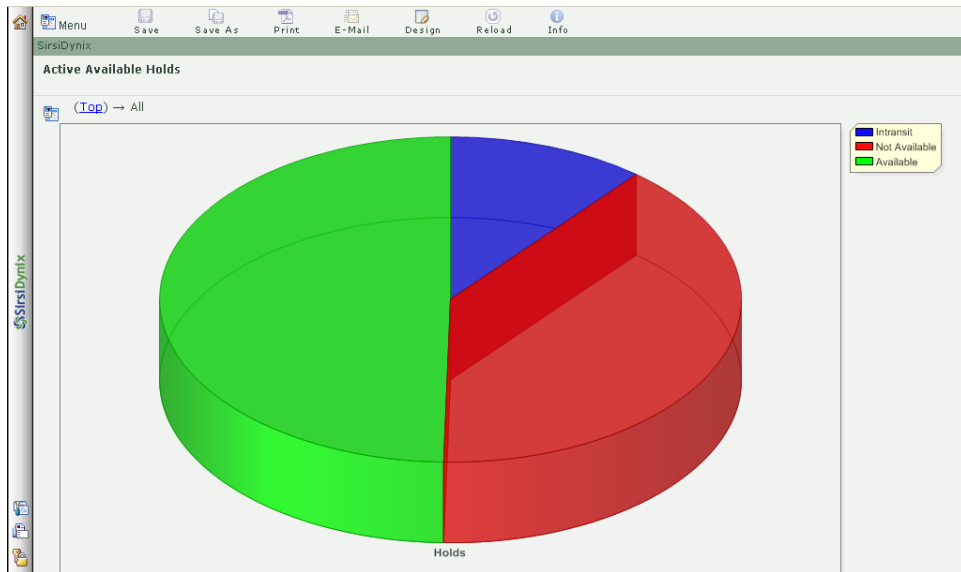


2. Click **Copy Image**.
3. Paste the chart into the new application (such as Microsoft Word):

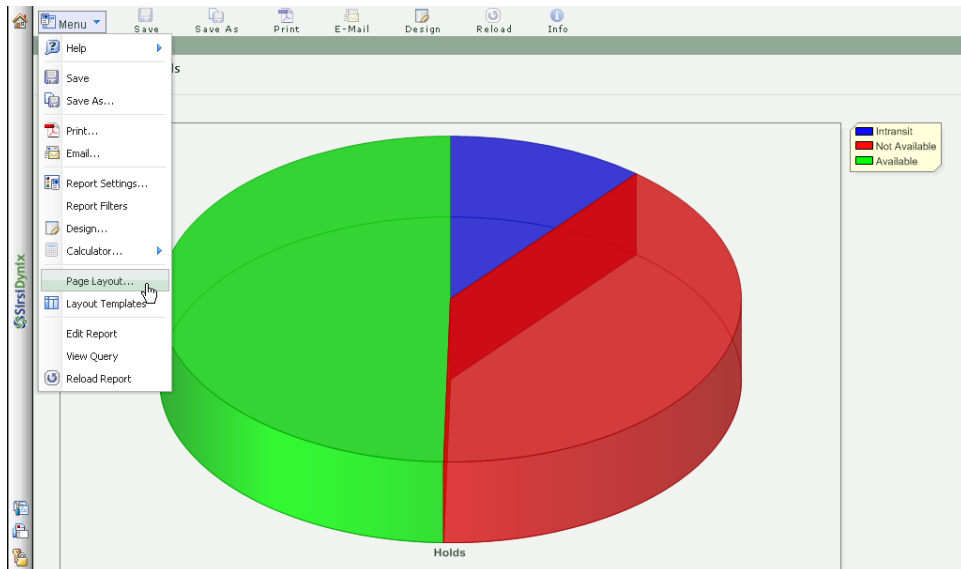


## ***To view data of a chart***

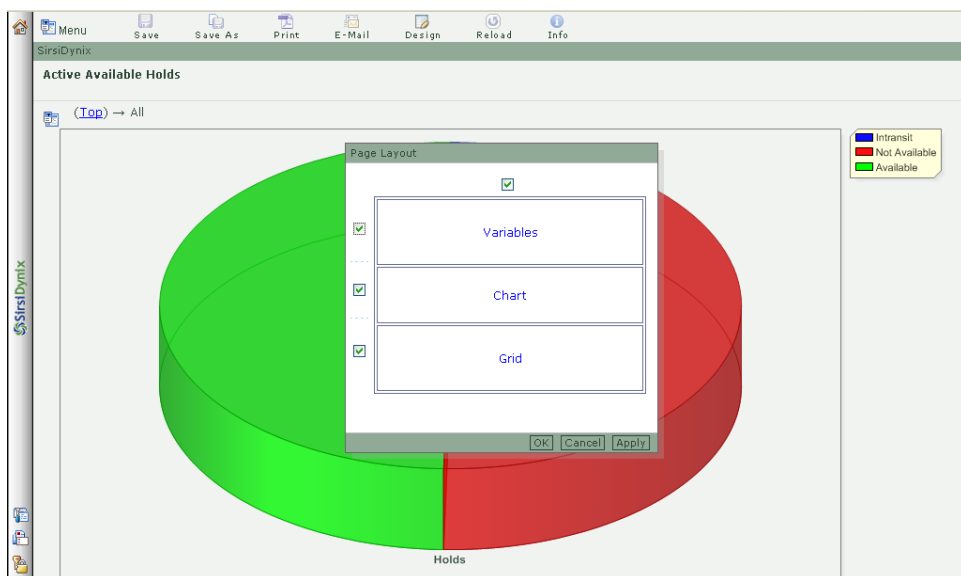
1. Display the chart report:



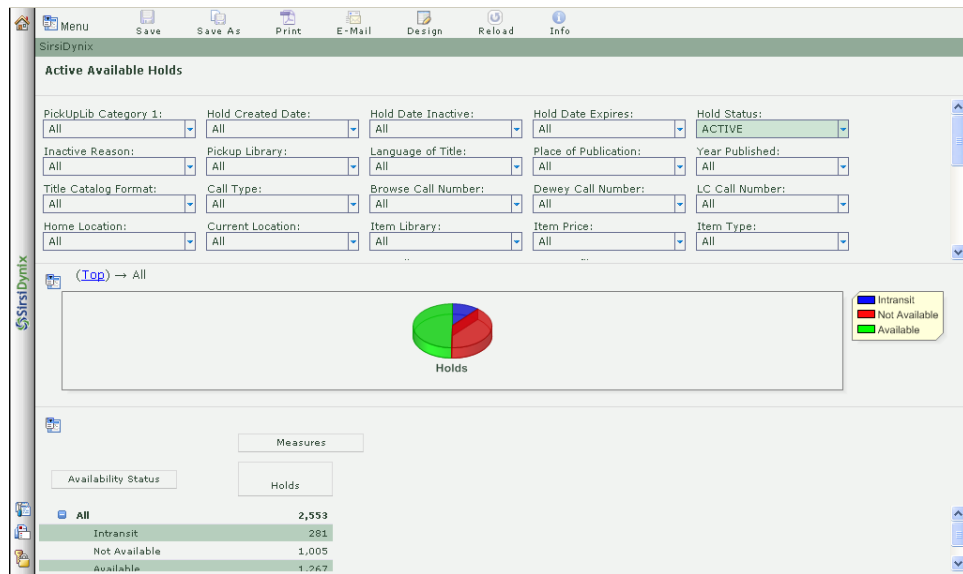
2. In the Report window, click **Menu**.
3. Select **Page Layout**:



4. Check the **Variables** and **Grid** sections to enable them.
- The Report window updates with report information:



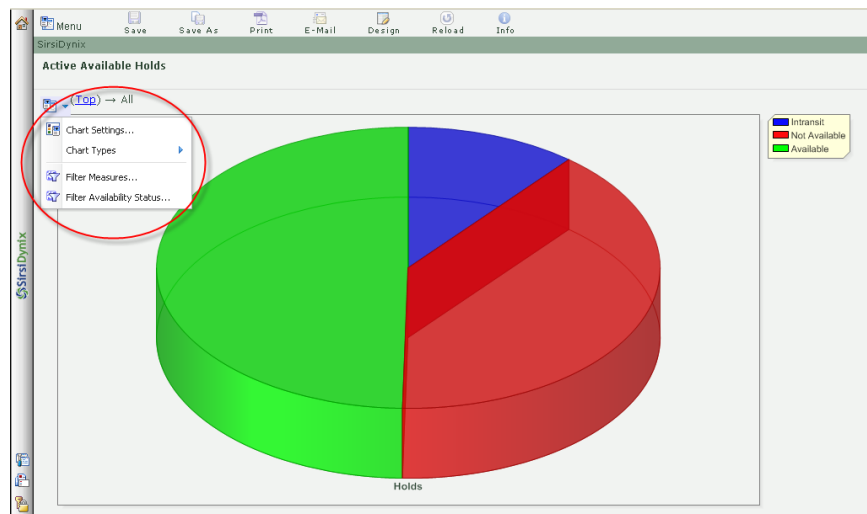
## 5. The Report window updates with report information:



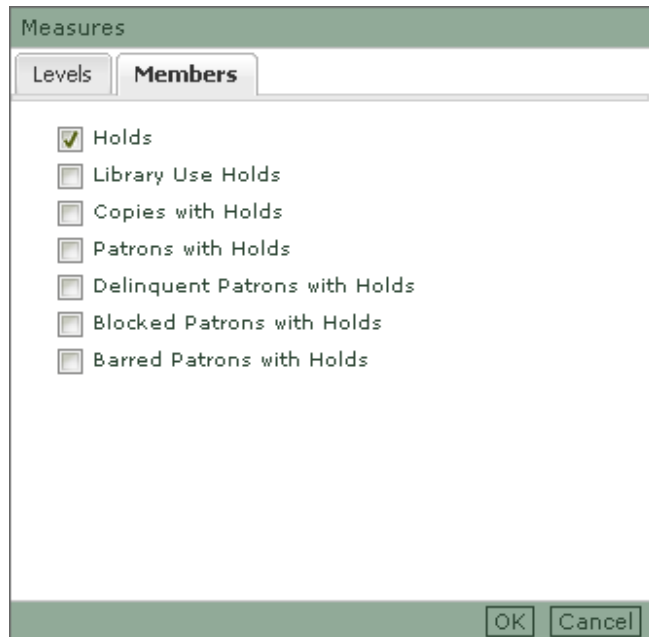
Any time a chart is created using the grid, it is always possible to retrieve the report to modify filters.

## Charts Menu

When you create a chart or go to a saved chart, you can modify the appearance with the **Menu** that displays on the Chart pane of every report. Using Chart Settings and Chart Types, you can change the chart type, swap axes, and make other display modifications. Chart reports are like any other report in that they can also be saved to the Dashboard or emailed to another Director's Station user:

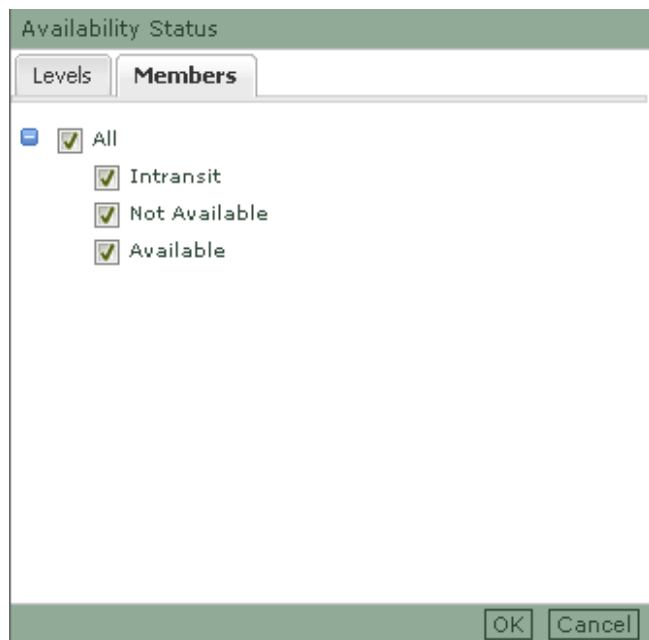


You can further modify the display of a chart from the Chart Menu by filtering the axes that are in play:



The Measures dialog box is shown with the 'Members' tab selected. It contains a list of measures with checkboxes. The 'Holds' measure is checked, while the others are unchecked. The dialog has 'OK' and 'Cancel' buttons at the bottom right.

Measure	Selected
Holds	<input checked="" type="checkbox"/>
Library Use Holds	<input type="checkbox"/>
Copies with Holds	<input type="checkbox"/>
Patrons with Holds	<input type="checkbox"/>
Delinquent Patrons with Holds	<input type="checkbox"/>
Blocked Patrons with Holds	<input type="checkbox"/>
Barred Patrons with Holds	<input type="checkbox"/>



The Availability Status dialog box is shown with the 'Members' tab selected. It contains a list of availability status options with checkboxes. The 'All' option is selected, and its sub-items 'Intransit', 'Not Available', and 'Available' are also checked. The dialog has 'OK' and 'Cancel' buttons at the bottom right.

Availability Status	Selected
All	<input checked="" type="checkbox"/>
Intransit	<input checked="" type="checkbox"/>
Not Available	<input checked="" type="checkbox"/>
Available	<input checked="" type="checkbox"/>

# Meters

When you view a report, you may find that some measures are very important, and should therefore be flagged to notify you when one or more thresholds are reached. Meters allow you to determine whether you have gone beyond a threshold value at a glance. Meters are typically saved only to your personal Dashboard and not to any public folders. However, an administrator can save meters across Dashboards.

Keep the following information in mind when you are creating meters:

- You can create as many thresholds for a single value as you need.
- You can create thresholds on multiple values in the same meter.
- If you are creating thresholds on multiple values they should be comparable.

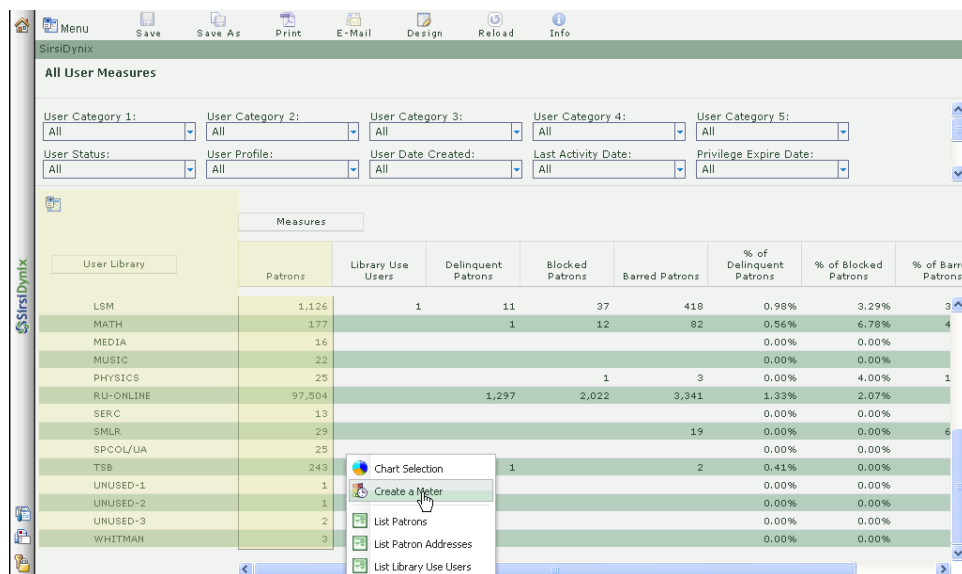
## Creating meters

### To create a meter

1. Display the report that contains the values you want to meter:

User Library	Patrons	Library Use Users	Delinquent Patrons	Blocked Patrons	Barred Patrons	% of Delinquent Patrons	% of Blocked Patrons	% of Barred Patrons
All	106,706	4	1,405	2,294	7,669	1.32%	2.15%	
ALCOHOL	42		1		22	2.38%	0.00%	5
ALCOHOL/NJ	3					0.00%	0.00%	
ALEXANDER	2,879		42	99	1,284	1.46%	3.44%	4
ANNEX	22					0.00%	0.00%	
ART	85			2	2	0.00%	2.35%	
CAMDEN	1,488	1	22	29	470	1.48%	1.95%	3
CHANG	56			2	7	0.00%	3.57%	1
CHEMISTRY	29				16	0.00%	0.00%	5
DANA	1,856		23	46	1,264	1.24%	2.48%	6
DOUGLASS	581		4	27	405	0.69%	4.65%	6
HUNGARIAN	8					0.00%	0.00%	
JAZZ	4					0.00%	0.00%	
KILMER	466		3	17	334	0.64%	3.65%	7
LSM	1,126	1	11	37	418	0.98%	3.29%	3
MATH								

2. Highlight the value or values that you want to track by clicking on the upper left corner of the column or columns you want to select and dragging to the lower right corner of the range.
3. In the **Menu** that displays, click **Create a Meter**:



A **Set Ranges** box displays with three default ranges supplied.

The 'Set Ranges' dialog box displays three default ranges. Each range includes a color swatch, a Low value, a High value, a Notify checkbox, and a Delete checkbox.

Color	Low	High	Notify	Delete
#B0F4AB	1000	1000	<input type="checkbox"/>	<input checked="" type="checkbox"/>
#FFFFA8	1000	2000	<input type="checkbox"/>	<input checked="" type="checkbox"/>
#FFC1C1	2000		<input type="checkbox"/>	<input checked="" type="checkbox"/>

Buttons at the bottom: Clear Ranges, Add Range, OK, Cancel.

Ranges apply to all cells that are selected.

4. Define each range and add ranges as needed.

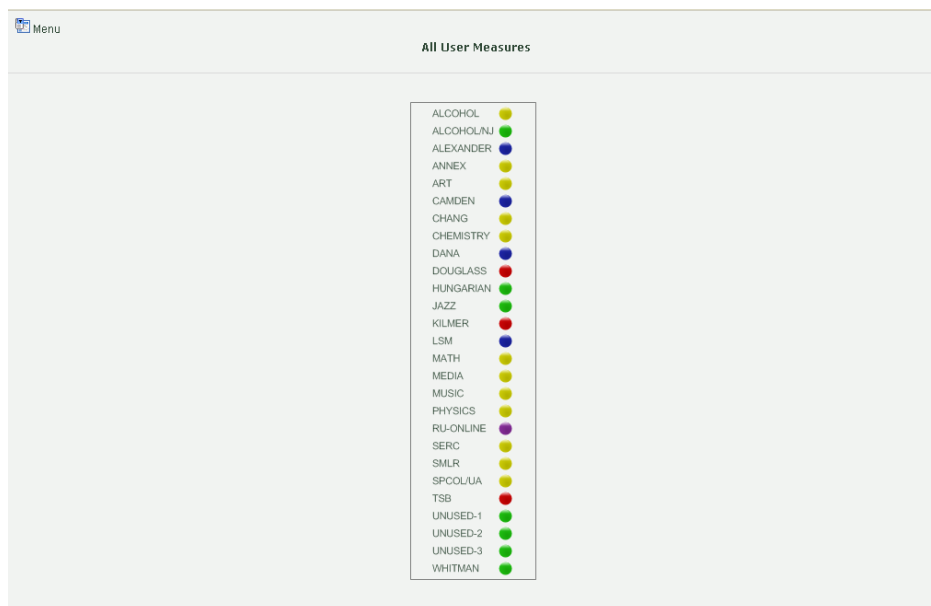
To change the color of a range, click on the color block and use the color finder to select the color you want:

The 'Set Ranges' dialog box contains the following data:

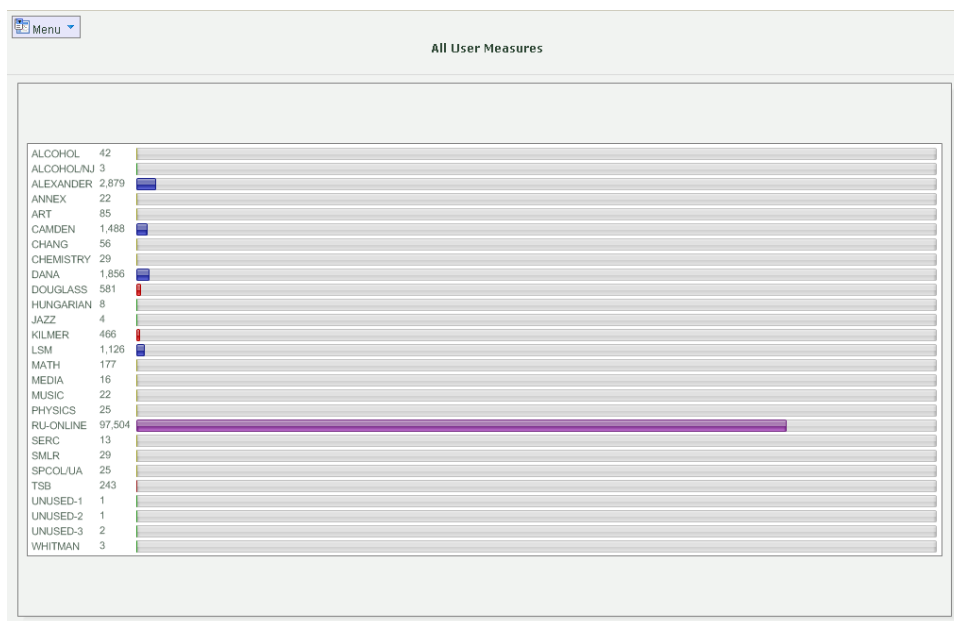
Color	Low	High	Notify	Delete
#39F229		10	<input type="checkbox"/>	<input checked="" type="checkbox"/>
#FFFF32	10	200	<input type="checkbox"/>	<input checked="" type="checkbox"/>
#FF3030	200	1000	<input type="checkbox"/>	<input checked="" type="checkbox"/>
#212CCE	1000	4000	<input type="checkbox"/>	<input checked="" type="checkbox"/>
#4C36C4				

Buttons at the bottom: Clear Ranges, Add Range, OK, Cancel

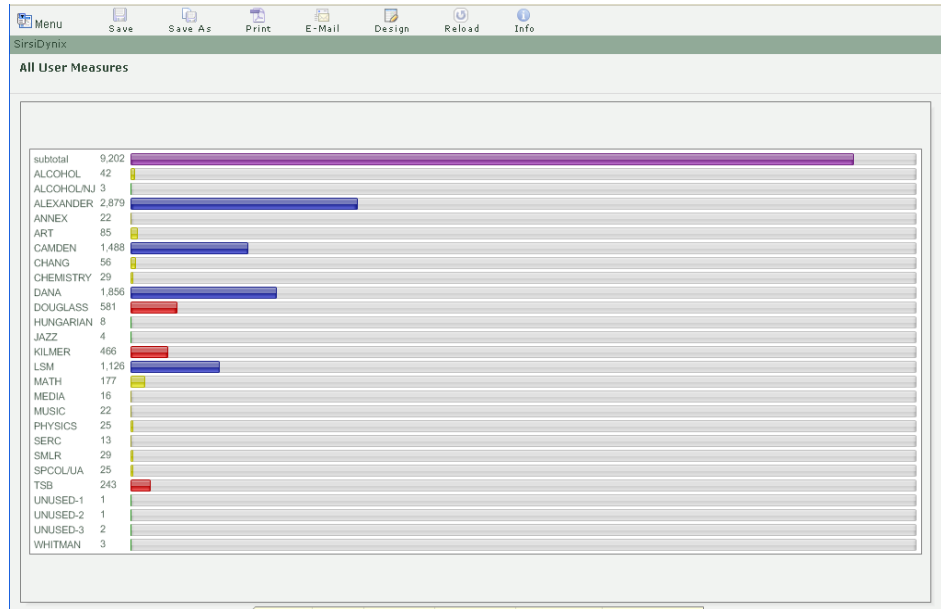
5. If you wish to be notified by email when the particular range thresholds have been met, check the Notify box.
6. Click OK to display the meter:



## 7. Use the Menu in the Meter to make modifications:



From the menu you can make modifications similar to reports and charts. In the example below, the tool bar and organization bar are displayed and the RU-ONLINE library, which is significantly larger than any of the other libraries, is removed from the display. Notice that subtotals are turned on for the report and the subtotal is also listed:



An alert must be saved both to My Folder and to SwiftLinks for it to be available for display in the SwiftMeters panel on the SwiftView.



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# SwiftLinks


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The SwiftLinks panel on the Dashboard contains links to general administrative links, reports, charts, and meters. Typically, delivered reports are available here for quick access. You may also save customized reports, charts, and meters to the SwiftLinks panel.

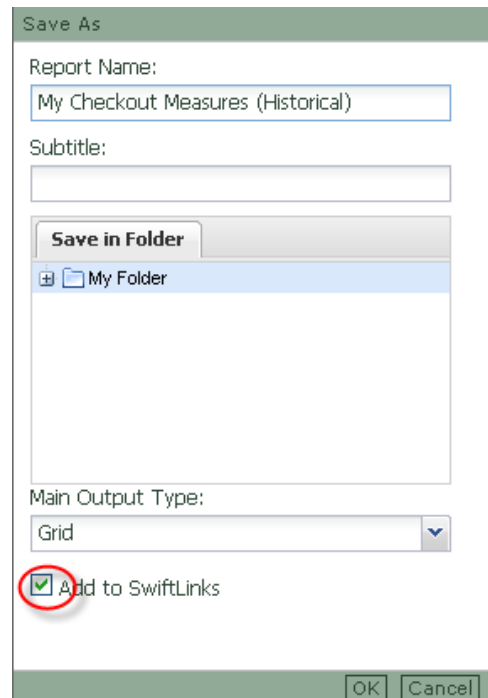
## *Saving Links*

Director's Station allows you to save links to your customized reports, charts, and meters. These links appear in the SwiftLinks panel of your Dashboard for easy access.

### **To save a link**

1. Click  on the toolbar or **Save As** in the Menu options to create a new report, chart, or meter.

The **Save As** dialog appears:

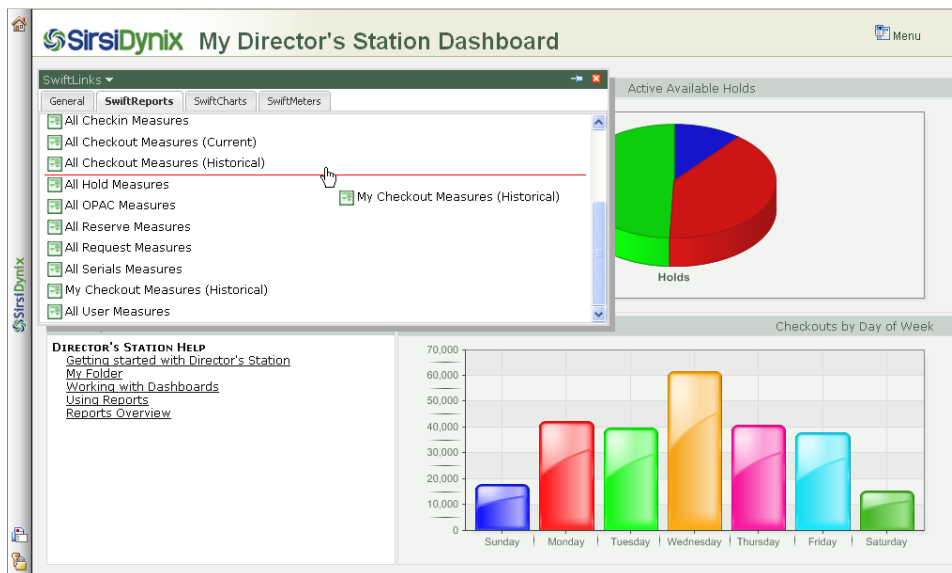


The image shows a 'Save As' dialog box with a green header bar. It contains the following fields and options: 'Report Name:' with a text box containing 'My Checkout Measures (Historical)'; 'Subtitle:' with an empty text box; a 'Save in Folder' section with a button and a list box containing 'My Folder'; 'Main Output Type:' with a dropdown menu set to 'Grid'; and a checkbox labeled 'Add to SwiftLinks' which is checked and circled in red. At the bottom right are 'OK' and 'Cancel' buttons.

2. Select **Add to SwiftLinks** to save this report, chart, or meter to the SwiftLinks panel on your Dashboard.

## Sorting links

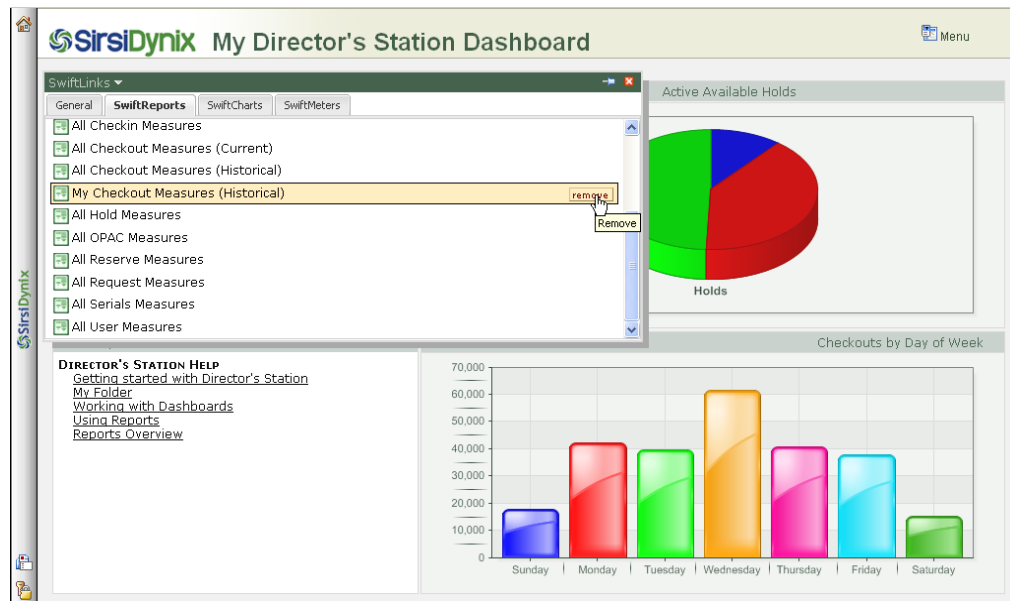
Links within the SwiftLinks panel may be sorted by the user. Click and drag each link to rearrange the reports, charts, or meters into any order the user would like.



## Removing Links

You are able to remove links within the SwiftLinks panel when you no longer need them. To do this:

1. Click on the SwiftLinks panel and find the report, chart, or meter that you wish to remove.
2. When it is highlighted, click **Remove**:



Removing a link from the SwiftLinks panel on your Dashboard does not remove the report, chart, or meter from My Folder or from Director's Station. You can delete the report from your personal My Folder if you no longer want it there.

Once a report is removed from SwiftLinks and My Folder, you cannot see it or access it, but it is still in Director's Station. To remove it completely from Director's Station, you need to contact your Director's Station administrator who can remove it.



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# Index

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## C

Calculator.....	59
Charts.....	70
creating .....	70
print to PDF .....	75
use in other application .....	76
Charts menu .....	79
Collection analysis reports .....	23
Creating charts .....	70
Creating reports.....	27

## D

Dashboard.....	7
Delivered reports.....	23
Design.....	57
Dimensions .....	25
limit dimension pool .....	34
more than one in report .....	32
Documents .....	19

## E

E-mailing reports .....	56
Exporting reports .....	67

## F

Filter columns .....	38
Filter in reports .....	42
Folders .....	18

## G

Grid Menu.....	67
Grid menu settings.....	68

## H

Hide Empty Data .....	62
-----------------------	----

## I

Items .....	17
-------------	----

## L

Links .....	19
-------------	----

removing .....	89
saving .....	87
sorting.....	88

## M

Manage My Folder.....	17
Measures .....	26
Members .....	
selecting.....	29
Menu .....	
reports.....	49
Menus .....	
charts .....	79
Meters .....	81
creating .....	81
Multi-column sort.....	68
My Director's Station Dashboard .....	10
My Folder.....	17
adding documents.....	19
adding folders.....	18
adding items .....	17
adding links .....	19
deleting items .....	21
editing items .....	20
managing .....	17
sorting items .....	22
storing items .....	21
My Profile .....	22
My SwiftView .....	10

## P

Panel content .....	14
Panel layout.....	12
Popout Menu .....	8
Printing reports.....	54
Public access analysis reports.....	24, 25

## R

Report Settings .....	62
hide empty data .....	62
show subtotals .....	63, 65
Reports .....	23
collection analysis .....	23
creating .....	27
delivered.....	23
dimensions.....	25
filter .....	42
measures .....	26
menu .....	49
printing .....	54
public access analysis .....	24, 25

saving .....51

saving as administrator.....52

title lists.....36

Reports toolbar.....8, 49

**S**

Saving reports .....51

as administrator.....52

Show Subtotals .....63, 65

Sort

SwiftLinks.....88

values within column..... 40

SwiftLinks..... 87

removing links..... 89

saving links..... 87

sorting links ..... 88

**T**

Title lists in reports..... 36

Toolbars

reports..... 8, 49